Five Minute Rapid Start Guide

A task is something you have to do, such as write a letter, or wash the car. You can predict and manage your workload effectively, and give yourself focus, by creating a list of all your tasks in Microsoft® Outlook® and then automatically scheduling them using Taskline.

To schedule your tasks for the first time:

1. In Outlook, open your **Tasks** folder.
2. Enter how long you think each task will take. To do this, first open an existing task in Outlook, for example by double clicking it, or create a new task by clicking:
   - Outlook 2007 – **File** menu → **New** → **Task**
   - Outlook 2010 – **Home** tab → **New Items** → **Task**
   - Outlook 2013 – **HOME** tab → **New Items** → **Task**
3. On the **Taskline** tab of the task form, enter how long you think the task will take in the **Total work** box, which is set to 0 by default. If you don't yet have a **Taskline** tab, use the **Details** tab. You can enter the **Total work** as a number of minutes, hours, days or weeks; the abbreviations are m, h, d and w. For example, to set **Total Work** to 3 hours, you can type "3h" or "3 hours". When you have updated **Total work**, click **Save and Close**.
4. Once you have assigned each task some **Total work**, start Taskline by clicking the Settings button on the Outlook ribbon. Or, if you are using Outlook 2007, click the Taskline button on the Outlook toolbar.

   Click **OK** on the Taskline dialog to accept the default options and schedule your tasks.
5. When Taskline has finished, double-click a task to display the **Taskline** tab. Notice that Taskline has calculated **Scheduled start** and **Scheduled end** dates and times for each task. The **Scheduled start** is the recommended or most likely start date. The **Scheduled end** is the calculated completion date. More about these dates.
6. Depending on which options you selected during Taskline Setup, Taskline might also place task entries in Outlook's calendar. These are entries in the calendar that represent your tasks. Task entries make it very easy to see what you are scheduled to do on any given day. Open your Outlook calendar and take a look! If you don't see task entries in your calendar and you would like them:
   1. Start Taskline by clicking the Settings (on Outlook 2007, Taskline) button in Outlook.
   2. Click the **Calendar** tab
   3. Select the **Create for tasks that are Not Started or In Progress** check box
   4. Click **OK** to have Taskline reschedule your tasks

   More on calendar task entries.
7. You will probably want your tasks to be carried out in a certain order. One way of setting this order is to give each task a **Priority (A1)** value. Open each task that you want to schedule and give it a **Priority (A1)** value, which is set on the **Taskline** tab of the task form in Outlook. For example, give the first task that you want to do a **Priority (A1)** value of B10, the second task B20, and so on. Now start Taskline again. On the **Tasks** tab of the Taskline dialog, set **Order by** to **Priority (A1)**, then click OK. Your tasks will now be rescheduled in the order you have set.

   Scheduling tasks using **Natural Order** is another popular method of setting the

task order. Tasks in Outlook have a natural order, which is the order Outlook displays them in when sorting and grouping is turned off. The benefit of using natural order is that task ordering can be changed simply by dragging tasks, or groups of tasks, up and down the task list. This method can often be quicker than changing priority values.

Notice that you use two main workflows in Taskline:

1. The Taskline application – Start Taskline by clicking the Settings (on Outlook 2007, Taskline) button in Outlook, or by using the Windows® Start menu. Taskline displays the options that control how it runs. Clicking **OK** will then schedule your tasks.
2. The Taskline task form – If you want to set options for scheduling an individual task with Taskline, such as **Total work**, you open the task in Outlook and set options on the **Taskline** tab of the form.

Some time management advice:

- You must leave some free time in your schedule, to allow for unforeseen items, or small items such as phone calls which cannot be scheduled individually but nevertheless collectively consume time. Scheduling yourself for every minute of your work day is not viable and you will inevitably fall behind schedule if you do this. You can build slack time into your schedule by setting the **Start work** and/or the **Stop work** times conservatively, or by adding **day time breaks** specifically for slack time. All these settings are on the **Working Hours** tab of Taskline's dialog, if you are using Taskline Professional Edition. For Taskline Standard Edition, they're on the **Working Week** tab. Another useful method is to overestimating task **Total work** times.

Some other things you can do are:

- On Outlook 2007, move the Taskline toolbar so that it takes up less screen space. If your display is wide enough, you can drag the small vertical bar to the left of the Taskline toolbar and move it to the end of the standard Outlook toolbar.
- If you have a simple list of tasks created using a text editor, word processor or similar, you can have Taskline convert this list into Outlook tasks. How?
- Read or work through the Taskline tutorial.
- Use **Natural Order** to set the order in which tasks are scheduled. How?
- Tell Taskline when you wish to start working on your task list. How?
- Force a task to start or finish on, before or after a certain date. You do this by placing a **constraint** on a task. More. Note that setting a task's **Start** or **Due** date has no effect on the way Taskline schedules tasks.
- Have Taskline update the task **Start** and **Due** dates, as well as **Scheduled start** and **Scheduled end**. How?
- Tell Taskline what days you work, and what hours you work on those days, so that Taskline can accurately schedule your work. If you are using Taskline Professional Edition, you enter this information on the **Working Hours** tab of the Taskline dialog box. If you are using Taskline Standard Edition, you use the **Working Week** tab. How?
- Limit the amount of time allocated to a task per day or per week, for example to spread a longer task out over several days or weeks, rather than working on it exclusively until it is completed. How?
- Manually override some or all of Taskline's scheduling by Pinning tasks or parts of tasks in Outlook's calendar.

- Update the tasks table view in Outlook to show task information particularly relevant to Taskline tasks, such as the **Scheduled start** and **Schedule end** dates, **Priority (A1)** and **Total work.** How?
- Read some useful tips and guidelines on Planning Your Work effectively.
- Find out how Taskline can help you.

What Taskline Can Do For You

A task is something you have to do, such as fill in your expenses claim, or wash the car. Many people write down all their tasks on a piece of paper, to create a to-do list. Outlook's task list is a computerized version of this paper to-do list. The standard Outlook task list allows you to create tasks, display them in a list and delegate them to others. However, Outlook cannot automatically schedule tasks, so you do not know when anything will get completed, or should be started. You do not know if deadlines can be met. This is where Taskline can help.

If you place appointments in the Outlook calendar, Taskline can put the tasks there too, so that you have one view that completely details everything you have to do. Taskline will keep the calendar automatically updated as things change.

Taskline accomplishes a similar job to expensive project management applications; it offers much of the power of the critical path analysis, but without the complexity. Taskline gives you answers to fundamental time-planning questions, such as:

1. When should I start each task, and when can I expect to finish?
2. When will I finish my current to-do list?
3. Are all my current deadlines actually achievable?

With Taskline, you can also quickly re-schedule your tasks, in response to changing priorities or new commitments. Unfinished tasks are automatically carried forward. Is it possible to complete that new assignment by the required deadline, given all your existing commitments? Taskline can tell you.

Taskline organizes your schedule in the following ways:

- Assigns each task a recommended, or most likely, start and end date and time. This process is called **Task Scheduling**. Such scheduling takes into account:
    - Preferred task order.
    - Your normal working week, and breaks during the day, such as lunch breaks.
    - The other commitments in your calendar, such as meetings and holidays.
    - Traveling time to and from meetings and other appointments.
    - External influences on tasks, such as deadlines.
- Tells you when you can expect to finish your task list, or parts of it.
- Tells you how new work will affect your existing commitments.
- Tells you whether deadlines are achievable.
- Carries forward unfinished tasks, rescheduling them for a future date.
- Gives you the expected dates of milestones, or goals, which are significant events in your task list, such as finishing a package of work.
- Issues enhanced reminders when or before tasks are due to start.
- Tracks tasks that are complete or in progress.
- Keeps a record of your completed work, either in the calendar or in a separate tasks folder.
- Visually distinguishes certain categories of Tasks on the Outlook Calendar so that you can glance at the Calendar and see the status, or categories, of tasks, such as all tasks not yet started.
- Allows you to assign each task to a project, to help you organize your tasks more effectively.

To learn the capabilities of Taskline, read or work through the Taskline tutorial.

Taskline Tutorial

As well as reviewing this tutorial, you may also wish to view the 5 minute Taskline movie on our web site.

This tutorial will bring you quickly up to speed with Taskline. The first 4 activities, which cover Taskline basics, take approximately 20 minutes to complete. The remaining activities will take a further 25 minutes. Completing these will enable you to get the most out of Taskline.

The tutorial describes basic activities in Taskline that you might want to accomplish in the typical work week. The tutorial uses the example of a technical writer in a large corporation. However, all of the activities are familiar ones that you might encounter in most professional settings or your personal life.

Important

- This tutorial is designed for Taskline Professional Edition only. If you are using the evaluation version of Taskline, make sure you are using Professional edition. If necessary, select the **Professional edition** radio button on the **Help / About** tab of Taskline's dialog, and then click **Apply**, to change Taskline versions.

Note

- While running through this tutorial, we recommend that you open this help file by clicking the **Taskline Tutorial** button on the **Help / About** tab of Taskline's dialog. Using this method will leave the help file open even when Taskline closes.

In our tutorial, the first three activities describe how to begin using Taskline:

- Entering the times that you work each week. You generally do this just once when you first start using Taskline.
- Planning specific tasks, including the estimated time for each task.
- Scheduling your work and showing your tasks in your Outlook calendar.

You use two general workflows in Taskline:

- If you want to enter general settings for your Outlook Calendar, your work week, and so forth, or you want to schedule your tasks, you click Settings on the ribbon in Outlook 2010 or 2013. For Outlook 2007, click the Taskline button. Or click Taskline on your Windows Taskbar, or the Desktop.
- If you want to set options for tracking an individual task with Taskline, such as a scheduling constraint or the task priority, you open the task and set options on the **Taskline** tab.

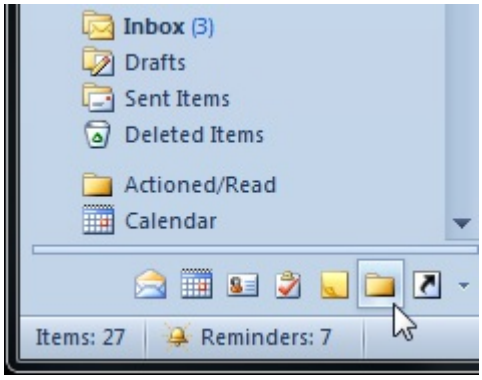
Create New Folders for the Tutorial Tasks and Appointments

For the purposes of this tutorial, we will create a new Outlook folder to contain the tutorial tasks and a second new folder for the tutorial appointments. This is to avoid existing tasks and appointments being intermingled with the items created during the tutorial. We will make these folders sub-folders of the existing **Tasks** and **Calendar** folders.

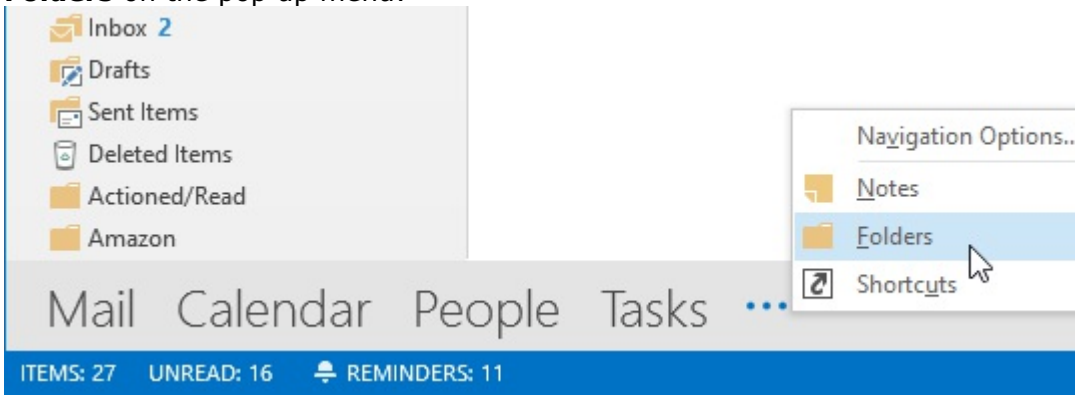
To create the new tasks folder:

1. If Outlook's **Folder List** isn't already displayed, have Outlook display it:

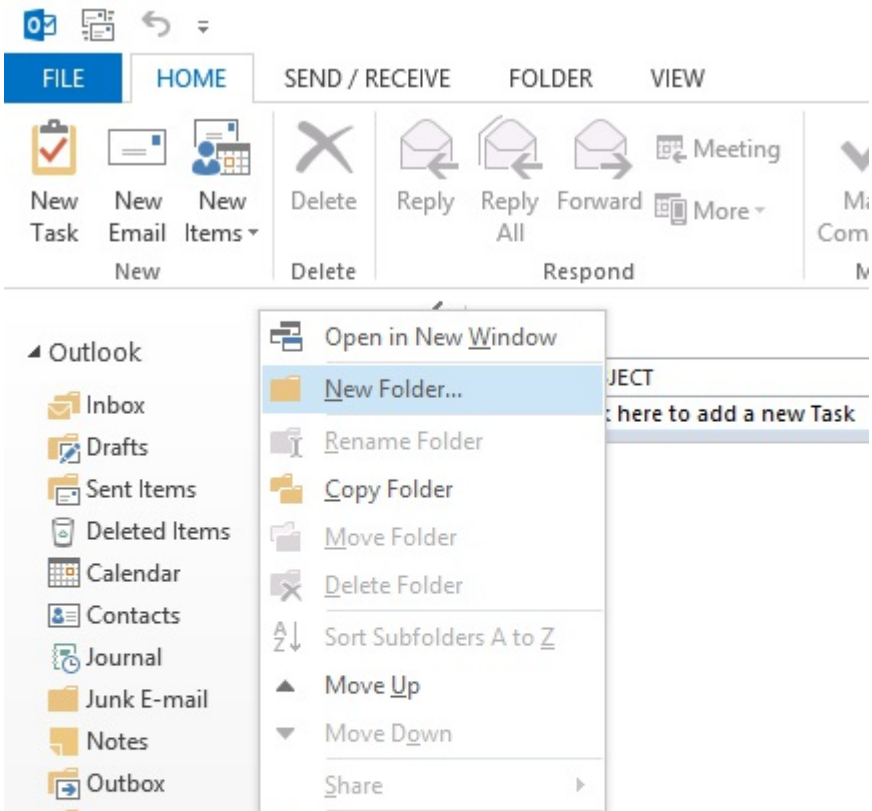
- In Outlook 2007 and 2010, click **View** → **Navigation Pane** → **Normal** and then click the **Folder List** icon at the bottom of the **Navigation Pane**:

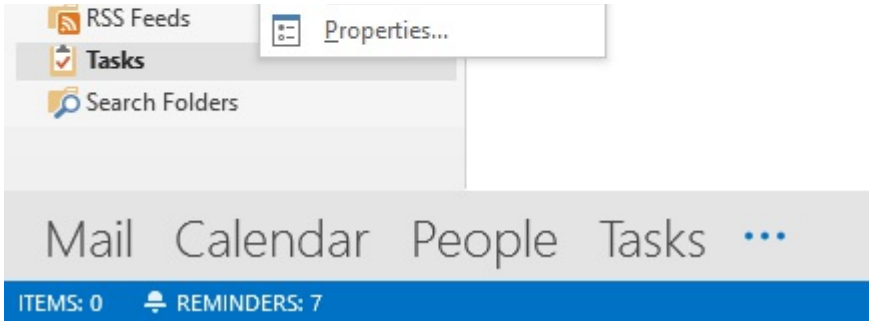


- In Outlook 2013, click '**...**' at the bottom of the main window and then click **Folders** on the pop up menu:



2. On the **Folder List**, right click your **Tasks** folder and click **New Folder** on the pop up menu:





The **Create New Folder** dialog will be displayed.

3. Type "Tutorial Tasks" in the **Name** box, which is the name of our new folder. Make sure that **Folder contains** shows **Task Items** and that the **Tasks** folder is selected in the **Select where to place the folder** list.
4. Click **OK** to have Outlook create the new folder.

To create the new calendar folder:

1. On Outlook's **Folder List**, right click your **Calendar** folder and click **New Calendar** on the pop up menu.
2. Type "Tutorial Cal" in the **Name** box. Make sure that **Folder contains** shows **Calendar Items**.
3. Click **OK** to have Outlook create the new folder.

Now we need to tell Taskline to use the folders we have just created:

1. Click Settings in Outlook to start Taskline, or click the Taskline button in Outlook 2007.
2. On the **Tasks** tab of the Taskline dialog, click the **Select** button for the **Schedule the tasks in** option. This will display the **Select Folder** dialog.
3. Select the **Tutorial Tasks** folder. You may need to click the **+** or ▷ sign, to the left of the **Tasks** folder entry, to display the **Tutorial Tasks** folder. OK the **Select Folder** dialog.
4. On the **Calendar** tab of the Taskline dialog, click the **Select** button for the **My appointments are in** option.
5. Select the **Tutorial Cal** folder and click **OK**.
6. Still on the **Calendar** tab, click the **Select** button for the **Write task entries to** option.
7. Select the same **Tutorial Cal** folder and click **OK**.
8. Back on the Taskline dialog, click the **Apply** button to save these changes.

Tip

- For more information about options and settings on any dialog box, click the Question Mark button (or depending on your Windows version) at the top right hand corner of the dialog and then click a dialog option.

We have now finished the initial tutorial housekeeping.

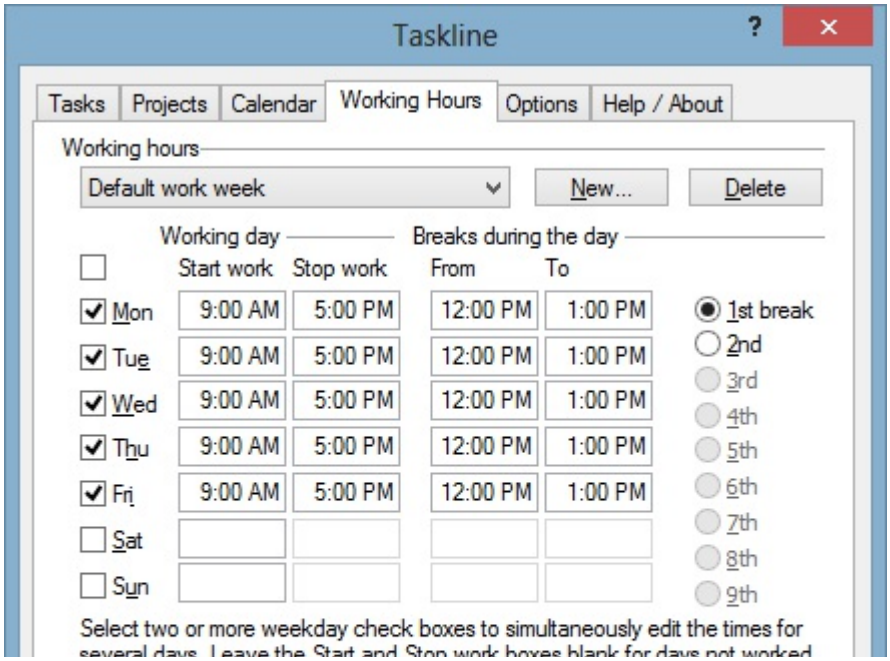
Entering Your Working Hours

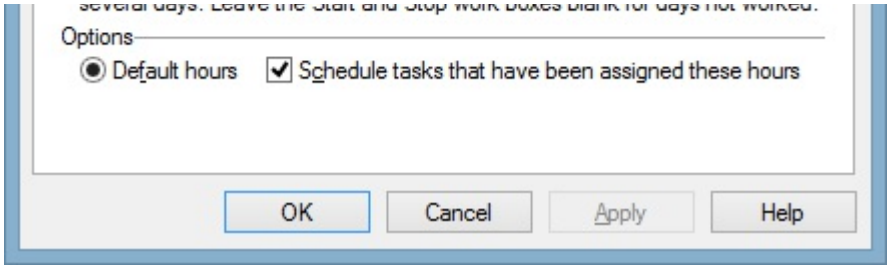
Note

- Times in this tutorial are shown using a 12 hour AM/PM format. If you are using a different time format, please convert to your local format when entering times.

When using Taskline for the first time, you must tell Taskline the hours that you work. In our tutorial example, as a technical writer for a large corporation, your typical week runs from 9:00 AM until 5:00 PM, Monday through Friday, with a one-hour break starting at 12:00 PM.

1. If Taskline is not already running, click Settings (on Outlook 2007, click Taskline) in Outlook.
2. Click the **Working Hours** tab on Taskline's dialog, then enter the following information:
   - In the **Working hours** drop down list at the top of the dialog, make sure **Default work week** is selected. If it is not, select it now.
   - Taskline Professional Edition supports working different hours on different days of the week, but in our tutorial example we will work the same hours Monday through Friday. The **Mon**, **Tue**, **Wed**, **Thu** and **Fri** check boxes should already be selected. The **Sat** and **Sun** check boxes should *not* be selected. If this is not the case, make these selection changes now. The check boxes allow you to enter the time for different weekdays simultaneously, typing the information only once.
   - In the **Mon** row of the **Start work** column of edit boxes, enter "9 AM". You can omit this step if all five **Mon** to **Fri** boxes already show "9 AM".
   - In the box to the right, the **Stop work** column, enter "5 PM". You can omit this step if all five **Mon** to **Fri** boxes already show "5 PM".
   - In the next box, the **From** column, enter "12 PM". This is the time your lunch break starts.
   - In the next box, the **To** column, enter "1 PM". This is the time your lunch break ends.
   - Make sure that both **Default hours** and **Schedule tasks that have been assigned these hours** are selected.
3. The **Working Hours** tab should now look like the following screen shot. Click **Apply** to save your settings and click **Cancel** to close the dialog box.





How Many Hours Do You Work in a Day?

Some people work 10 hours a day, others much less. When we tell Taskline or Outlook that a task lasts for 1 day, or for 1 week, how many hours does that mean? So, for the final part of our initial setup, we must now tell Outlook how many working hours there are in a day and in a week:

- If you are using Outlook 2007, click **Tools** menu → **Options** → **Other** tab → **Advanced Options** button, to display the **Advanced Options** dialog.
- If you are using Outlook 2010 or 2013, click **File** (or **FILE** in Outlook 2013), then **Options** in the left hand bar, then **Tasks** in the left hand bar.

1. In **Task working hours per day**, enter 7. Note that this information excludes your lunch hour.
2. In **Task working hours per week**, enter 35.
3. Click **OK** on all the open Outlook dialogs.

Entering Your Tasks

The first stage in work scheduling is to break your work down into small chunks, or tasks. Each task should represent a specific part of your work. It should be short in duration – ideally just a few hours and certainly no more than a few days.

In our tutorial example, the first step in your work week involves planning three projects that are due soon:

- Chapter 2 of a user manual, which you think will take you 2 days and is your first priority.
- Proof read a booklet, which will take you 3 hours and is your second priority.
- Research documentation tools, which will take you 1 day and is your third priority.

To create the first task, take the following steps:

1. In Outlook, open the **Tutorial Tasks** folder you created earlier by clicking the **Tutorial Tasks** entry in the **Folder List**. If you cannot see the **Tutorial Tasks** entry, then click the **+** or ▷ signs to the left of the **Tasks** folder on the **Folder List**. This will display sub-folders. Now click the **Tutorial Tasks** folder to open it.
2. Create a new task:
    - In Outlook 2007, click **File** menu → **New** → **Task**.
    - In Outlook 2010 and 2013, click the **New Task** button on the **Home** (Outlook 2013 **HOME**) ribbon.
    - Or, for any Outlook version, simply double click a blank area of the task list.
3. Enter the following information:
    - On the **Task** tab, enter "User Manual chapter 2" in the **Subject** box.

- On the **Taskline** tab, in the **Total work** box, enter "2d". This is shorthand for 2 days.
- In the **Priority (A1)** box, enter "A10". With **Priority (A1)**, you must enter a letter. The number is optional.

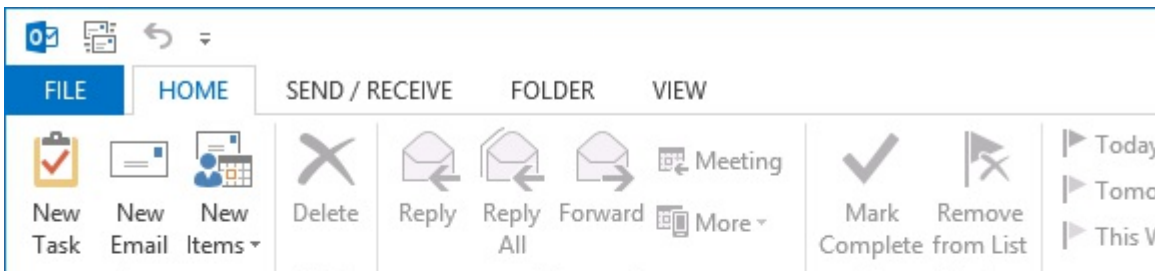
4. Click **Save & Close**.

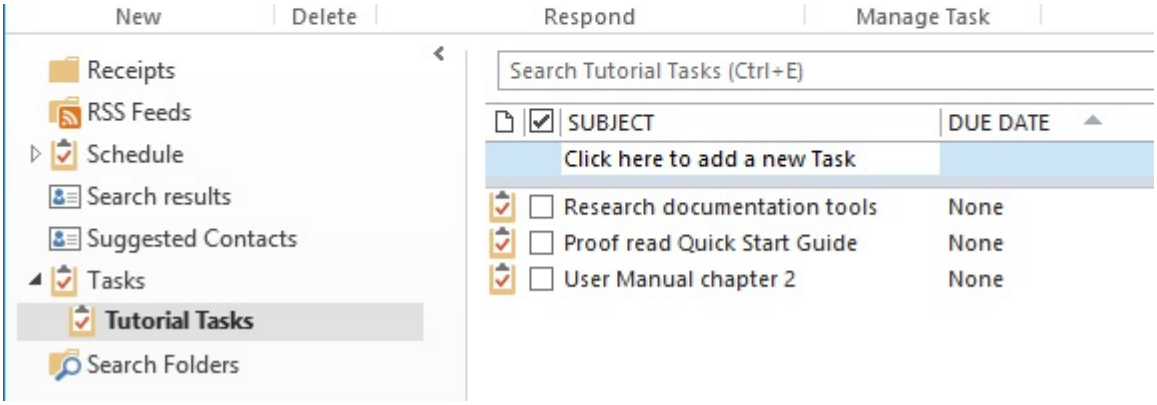
You are now ready to create the second and third task.

1. To create the second task, repeat the previous steps, 1-3, entering the following information:
   - On the **Task** tab, enter "Proof read Quick Start Guide" in the **Subject** box.
   - On the **Taskline** tab, in the **Total work** box, enter "3h". This is shorthand for 3 hours.
   - In the **Priority (A1)** box, enter "A20".
   - Click **Save & Close**.
2. To create the third task, repeat the previous steps, 1-3, entering "Research documentation tools" in the **Subject** box, "1d" in the **Total Work** box, and "A30" in the **Priority (A1)** box.

   Tips
   - You can enter fractions in durations, for example "1.5 hours".
   - Setting task priorities with a letter and numeric value ending in zero, such as A10, A20, and so forth, allows you to insert other tasks in the future that may have priorities in between the priorities of your original list of tasks. In Taskline, you can also reprioritize your tasks quickly and easily by selecting the **Options** tab and then clicking the **Renumber or Re-letter Priority (A1)** button.
   - You are not restricted to using **Priority (A1)** to order your tasks. For example, you can tell Taskline to schedule your tasks in the order they are displayed in Outlook's task list instead, when all sorting and grouping is turned off. This is called Natural Order. Displaying and scheduling tasks in Outlook's Natural Order is convenient, because tasks can be reprioritized by dragging them up and down the task list. However, this tutorial uses **Priority (A1)**, which is also a flexible method of prioritizing tasks.
   - Notice that when you have entered a value for **Total work**, the **Ignore this task** check box is deselected. All new tasks are ignored by Taskline by default, but as soon as you add some **Total work**, the **Ignore this task** check box will be automatically deselected. If you wish to have Taskline schedule a milestone, which is a task with zero **Total work**, you will need to manually deselect the **Ignore this task** check box.
   - Taskline also works with the tasks you already have, before you installed the software. When Taskline runs, it converts standard Outlook tasks to Taskline tasks.

   To view your tasks, you can click the **Tutorial Tasks** folder in Outlook. With Outlook 2013, you should see something like this:





Now that you have planned your tasks, you can schedule them, as described in the next activity in this tutorial example.

Scheduling Your Tasks

Taskline makes planning your work quick and easy. Taskline schedules your work around existing appointments and also to fit in with your **Working hours**. When you have scheduled your tasks with Taskline, you can also view them in the Outlook Calendar, like any other appointment.

In our example, let's assume that today is a Saturday and you are planning your activities for next week. You want to run Taskline to schedule all three of your tasks for next week.

1. In Outlook, click Settings (on Outlook 2007, click Taskline) to display the Taskline dialog.
2. For the purposes of this tutorial, clear the **Default to current date and time** check box, which is on the **Tasks** tab. For real work however, it is common to leave this selected.
3. In the **First task starts at** box, click the down arrow and select whatever date is the Monday just gone. Then, click on the **First task starts at** box and use the keyboard to change the time to **9 AM**. Or, if today is Monday, select today's date, but again change the time to **9 AM**. This date is the starting point for your schedule. It is not usual to plan in the past, but selecting the previous Monday is convenient for our tutorial, because Outlook initially opens the calendar on the current week.
4. On the **Order by** list, select **Priority (A1)** and (if necessary) **Ascending**. This makes sure that Taskline schedules your tasks in the order of their **Priority (A1)** values.

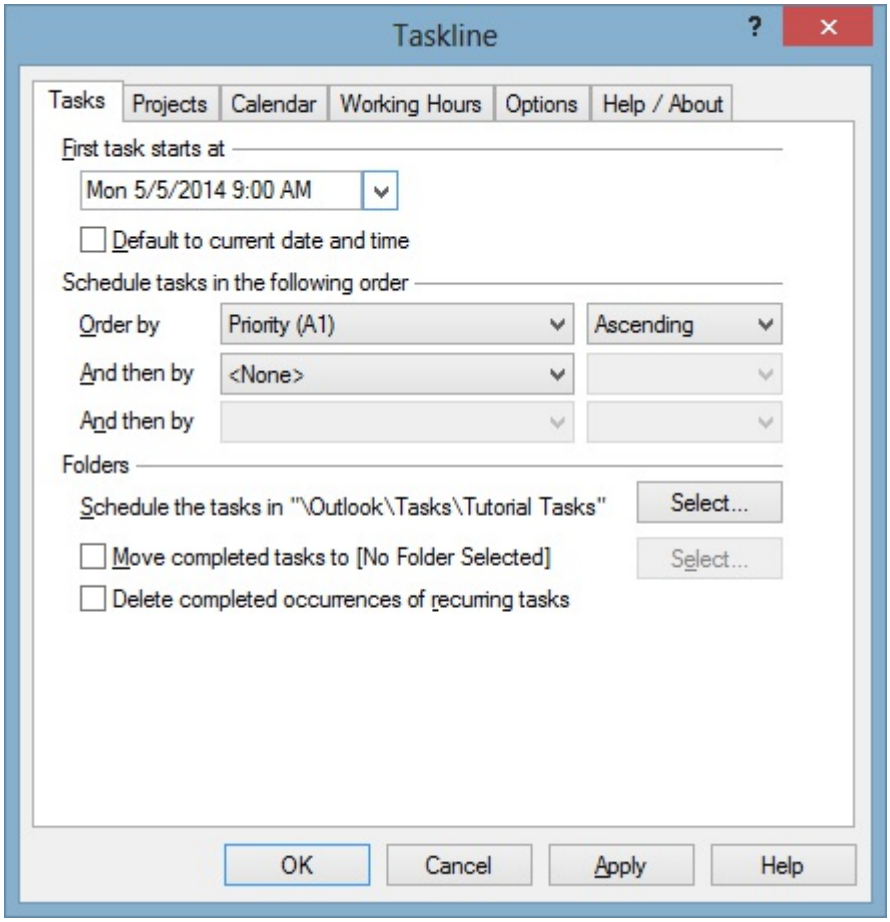
   Tips

   - Task ordering, for example by using **Priority (A1)**, is a simple system that is used in place of the complex logic links used by Project Management software.
   - You can change the priority later by editing the task.
   - If you want to make task priority more visible, you may wish to manually prefix the **Priority (A1)** value to the start of the task subject, for example "A20 Proof read chapter 2", and then **Order by Subject**. This allows you to see and change **Priority (A1)** on the Subject line, although you will not be able to use the **Renumber or Re-letter Priority (A1)** if you use this method.
   - **Order by Natural Order** is another popular method of ordering your Taskline

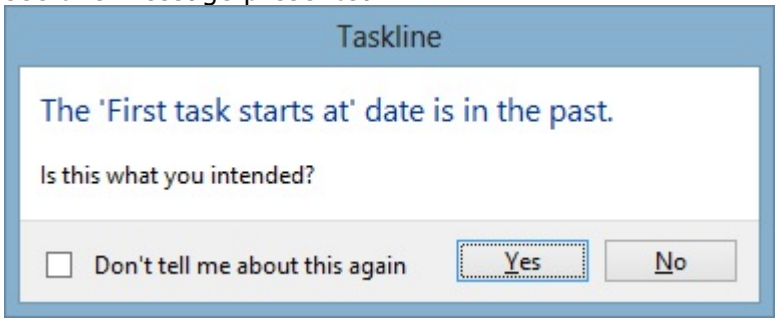
tasks. Having your tasks displayed in natural order and scheduled in descending natural order is often a very convenient way of working, because the order in which you see your tasks is the order in which Taskline schedules them. You can easily change this order by simply dragging the tasks up and down the view in Outlook. More.

- Natural Order only works with the tasks shown in your selected Outlook Tasks folder. It cannot be used with Outlook's **To-Do Bar**/**To-Do List**.

Your **Tasks** tab of the Taskline dialog should now look like the screen shot below, although your **First task starts at** date will will depend on whatever date you selected:



5. On the **Calendar** tab, select the **Create for tasks that are Not Started or In Progress** check box, if necessary. This step tells Taskline to show your tasks in Outlook's calendar. It does this by creating "calendar task entries", which are appointments that represent your tasks.
6. Click **OK** to close the Taskline dialog box and schedule your tasks. You may then see this message presented:



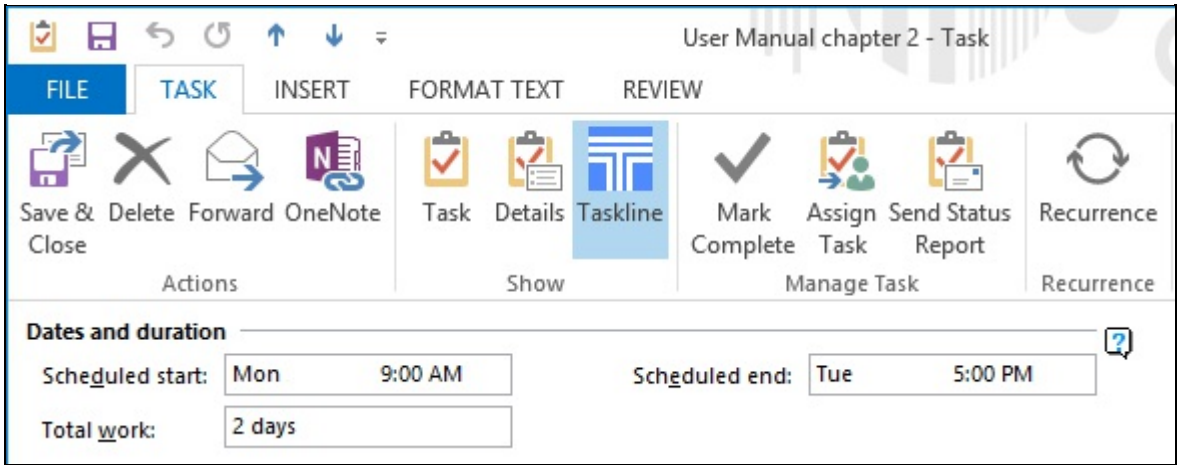
Taskline warns you because starting your schedule in the past is unusual. However, we have chosen a start date of last Monday just for the purposes of this tutorial, so select the **Don't tell me about this again** check box and click **Yes** to continue.

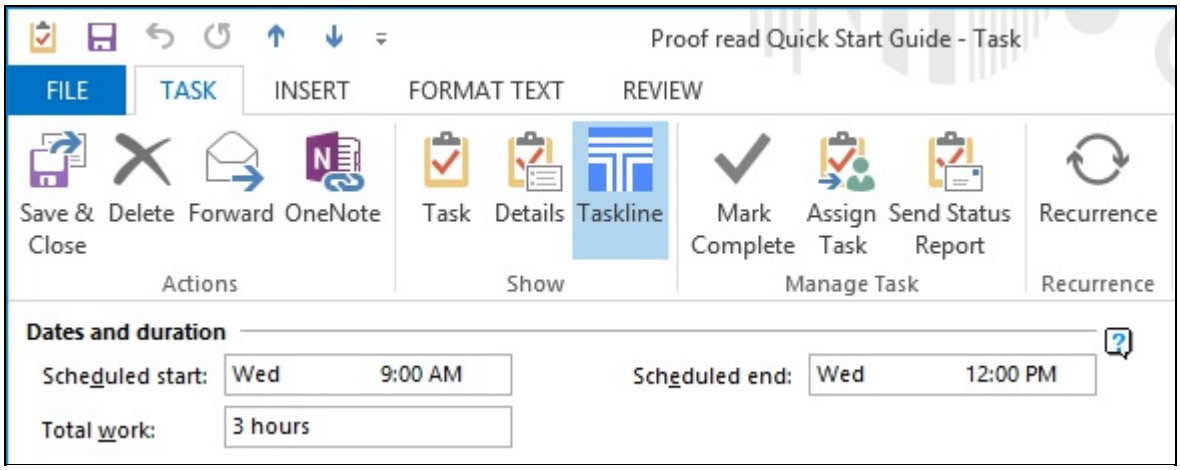
When Taskline has finished, the **Summary of Task Schedule** dialog box may appear. This contains useful information about your task list that we won't explore in this tutorial, so simply click **OK** to close this.

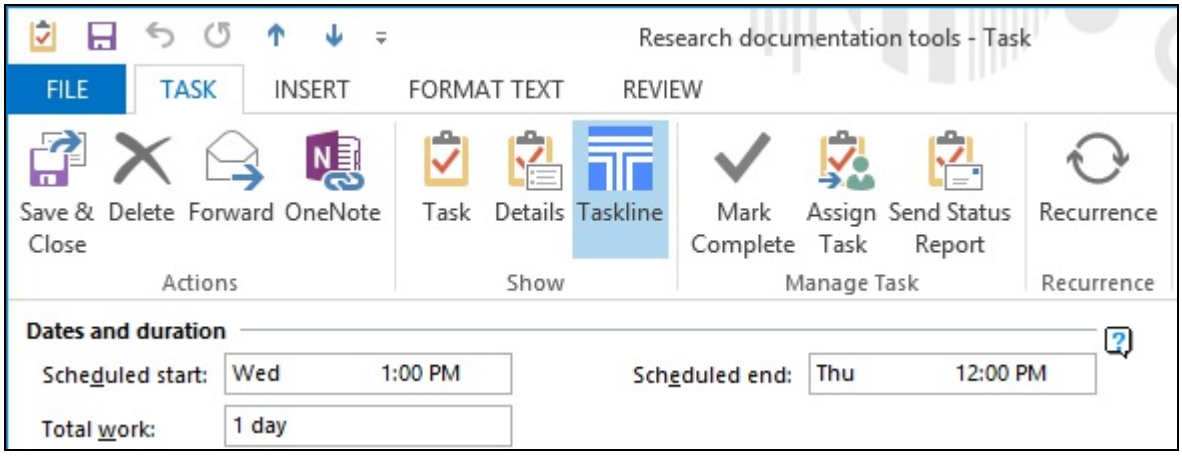
Taskline will now have updated your task list and your calendar. To see the results of these steps, in Outlook, click the **Tutorial Tasks** folder and double-click a task. When you open your tasks in Outlook, you can see that dates have been set in the **Scheduled start** and **Schedule End** boxes on the **Taskline** tab. These are the estimated or most likely start and end dates for your tasks.

As few people can predict future work with 100% accuracy, for example a meeting may take longer than anticipated, you cannot usually start and finish every task exactly on schedule. However, the **Scheduled start** and **Scheduled end** dates give you a very good idea of when you are likely to start working on a task, and when you are likely to finish it.

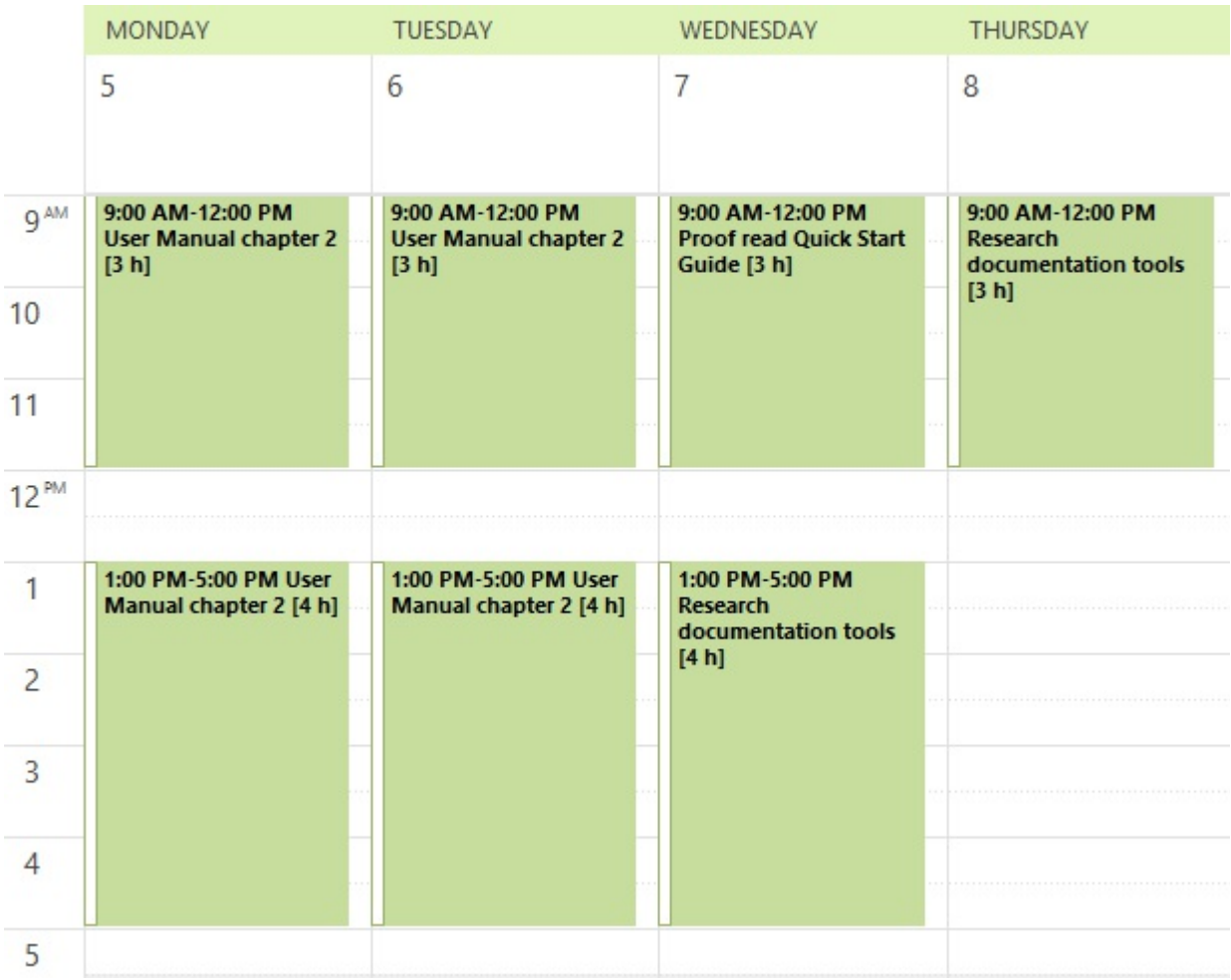
You should have the same days and times as those shown below, but because your task dates depend on your chosen **First task starts at** date, dates have been removed from these screen shots:







Now open your **Tutorial Cal** folder to see your tasks in Outlook's calendar. The calendar shows exactly the same date and time information as the tasks, it is just the view of that information that is different:



Calendar task entries (the appointments that represent tasks) usually get deleted and recreated each time Taskline is run, so it is best not to change them, but rather change the task instead.

Tip

- You can **pin** calendar task entries so that they survive a Taskline reschedule. This enables you to use Taskline to automatically schedule your tasks and then tweak those results manually.

You have finished the first three activities that describe how to start using Taskline:

- Setting your work week.
- Entering tasks.
- Scheduling tasks.
- Viewing your schedule in Outlook's calendar.

Tip

- When you are working with your own tasks, bear in mind that it is often difficult to predict all your tasks in advance and as such you should make an allowance in your schedule for unpredictable or spontaneous work. Working on unscheduled tasks can result in unnecessary pressure, because it almost inevitably means that you get behind with your scheduled work. Never schedule yourself for every minute of every day. Instead, build some contingency, or slack time, into your schedule. Some methods for doing this are:
    - Enter less **Working hours** in Taskline than you actually do.
    - Enter an extra break during the day, to represent contingency.
    - Over estimate **Total work** on your tasks.

You now know the basics for using Taskline. The remaining activities, continuing the same example from the first activities, describe how you can get the most out of Taskline:

- Customizing your **Tasks** folder so that you can easily view and edit Taskline information, such as **Priority (A1)**.
- Adding new appointments to your Outlook Calendar after you have planned your week. Taskline automatically adjusts your task schedule for new appointments.
- Managing new work and deadlines.
- Using more than one set of **Working hours**, so that different tasks can be scheduled for different time slots.
- Adding colors to tasks in your Outlook calendar, so that you can quickly identify the **Status** or **Category** of different tasks.
- Completing tasks.

If you prefer not to undertake any further activities, please now jump to the last section of this tutorial, Tidy Up.

Getting a Better View of Your Tasks in Outlook

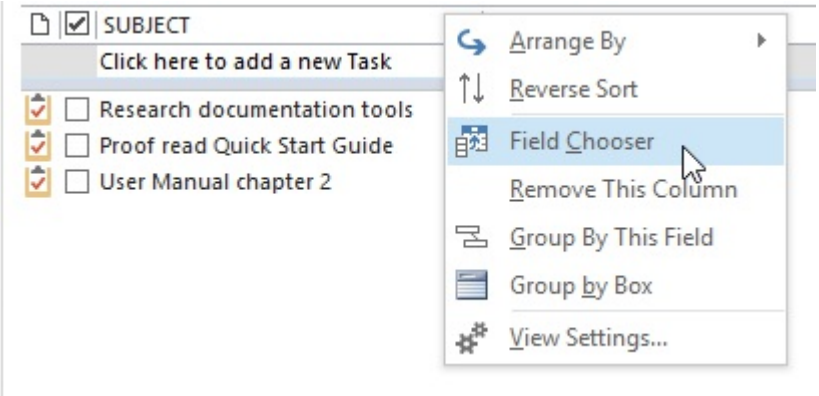
You can customize the columns in your Task folder to view any information that Taskline tracks. This is convenient if you would like to quickly view a short list of your tasks, identify tasks by sorting the list, or print a checklist of your planned week.

In our tutorial example, after you have scheduled your tasks, you decide to change the **Tutorial Tasks** folder view to show some Taskline information. You want to see **A1, Total work, Scheduled Start** and **Scheduled end** as columns in the **Tutorial Tasks** folder in Outlook. **A1** represents **Priority (A1).**

First, you must customize the view of the task folder so that you can select Taskline column headings.

1. In Outlook, open the **Tutorial Tasks** folder. Point to the column headings in the **Tutorial Tasks** folder, such as **Subject,** right-click, and select **Field Chooser** on

the shortcut menu:

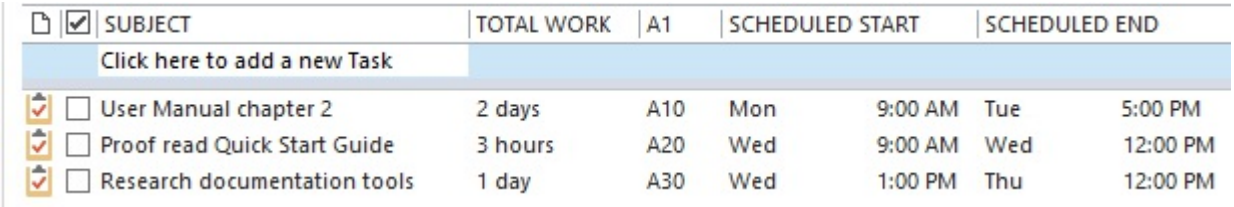


2. To start adding columns, or fields, to the folder view, click **All Task fields** in the dropdown list on the **Field Chooser**.
3. In the list box, drag **Total work** from the box to the column headings in the **Tutorial Tasks** folder. Drop **Total work** at the right end of the column headings. The Task folder view updates to display the **Total work** column. You can now see the total amount of work that you assigned to each task in the **Tutorial Tasks** folder view quickly and easily.
4. In the dropdown list at the top of the **Field Chooser**, click **User-defined fields in folder**. The list automatically updates to display a list of the fields, or column headings, that Taskline uses.
5. To add the Taskline information to the **Tutorial Tasks** folder view, drag the following fields off the **Field Chooser** to the column headings: **Scheduled end**, **Scheduled start** and **A1**.
6. Close the **Field Chooser** by clicking on its close box

Tip

- You can place the column headings in any order. For the purposes of this example, column headings are displayed in the following order: **Subject**, **Total work**, **A1**, **Scheduled start**, and **Scheduled end**. **Due Date** is usually displayed as a default column heading. You can remove it by dragging the column heading outside the Outlook window.

The **Tutorial Tasks** folder now displays columns that represent each of the fields that you selected. You can sort the columns to identify the order of tasks. For example, to view the tasks in order of priority, you can click the **A1** column heading. The picture below shows the columns in the **Tutorial Tasks** folder. Again, the dates have been removed from the screen shots, which show only days and times. This is to avoid confusion, as your dates depend on your choice for the **First task starts at** date.



SUBJECT	TOTAL WORK	A1	SCHEDULED START		SCHEDULED END	
Click here to add a new Task						
User Manual chapter 2	2 days	A10	Mon	9:00 AM	Tue	5:00 PM
Proof read Quick Start Guide	3 hours	A20	Wed	9:00 AM	Wed	12:00 PM
Research documentation tools	1 day	A30	Wed	1:00 PM	Thu	12:00 PM

Now that you can easily view your tasks in the **Tutorial Tasks** folder, you can change task properties by clicking in a row.

Important

- You cannot manually edit the **Scheduled start** and **Scheduled end** dates. These are the dates that Taskline calculates.

The next activity illustrates how Taskline automatically adjusts your task schedule to accommodate new appointments.

Adding New Appointments

When you add a new appointment to your Outlook Calendar, Taskline automatically adjusts your tasks around the new appointment.

In our tutorial example, you remember that you have a training course on Wednesday morning. Take the following steps to add a new appointment to your Outlook Calendar:

1. In Outlook, open your **Tutorial Cal** Outlook folder.
2. Create a new appointment:
   - In Outlook 2007, click **File** menu → **New** → **Appointment**.
   - In Outlook 2010 and 2013, click the **New Appointment** button on the **Home** (Outlook 2013 **HOME**) ribbon.
   - Or, for any Outlook version, simply double click a blank area of the calendar.
   - Or, again for any Outlook version, type **Control+Shift+A**.
3. On the **Appointment** tab, enter "Training course" in the **Subject** box.
4. Select **Out of Office** from the **Show as** setting, which is in the **Options** section of the ribbon. This makes sure that Taskline schedules your tasks around this appointment.

   Tip

   - When working with Taskline in the future, if you want Taskline to ignore an appointment, select **Free** in the **Show as** list.
5. Deselect the **All day event** check box, if it is selected, because this training course lasts only for the morning.
6. In the first **Start time** box, enter the date corresponding to Wednesday of the current week. In the second **Start time** box, enter a time of "9:00 AM" and in the **End time** box, enter "12 PM".
7. For the purposes of this tutorial, we'll turn off the appointment reminder. Choose **None** from the **Reminder** drop down list, which is shown underneath the **Show as** setting on the ribbon.
8. Click the **Save & Close** button.

   Tip

   - You can set travel times before and after appointments on your Calendar.

You now need to tell Taskline to *Reschedule* your work, to take account of the new appointment:

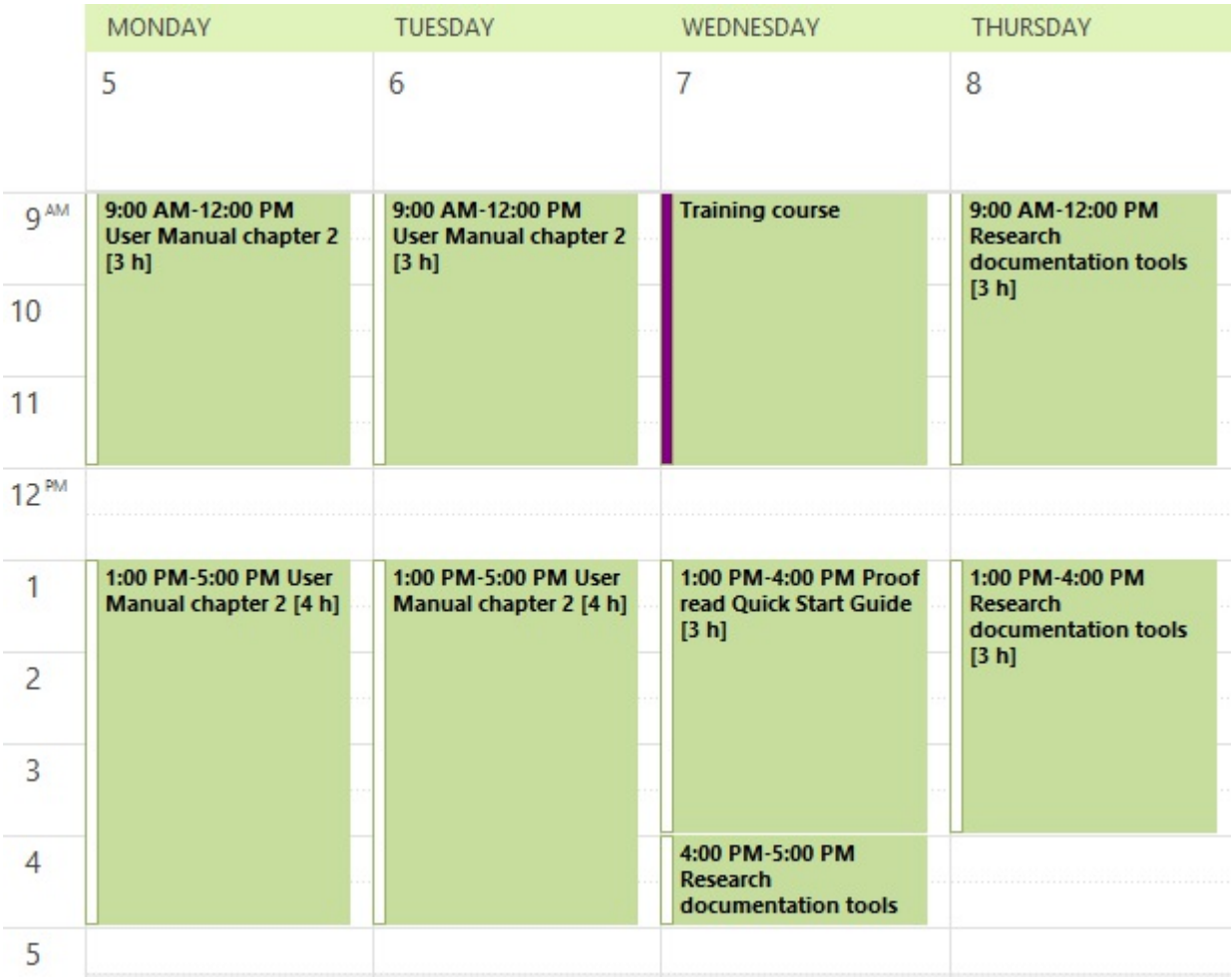
1. Click Settings (on Outlook 2007, click Taskline) then, when the dialog appears, simply click **OK** on the Taskline dialog to run Taskline.
2. If the **Summary of Task Schedule** dialog appears, click **OK** to dismiss it.

Tip

- You can run Taskline immediately, without showing the Taskline dialog first, by clicking **Reschedule** on the ribbon or, if you are using Outlook 2007, holding

down the Shift key while you click on the Taskline toolbar button.

Now open your **Tutorial Cal** folder to see your updated schedule. If you have Outlook's **Work Week** view selected, it should look like the screen shot below:



The next activity in our tutorial explains how to handle new tasks and accommodate deadlines.

Managing New Tasks and Deadlines

Taskline automatically adjusts existing tasks, on your Calendar and in the task list, to allow for new tasks.

In our tutorial example, you get a call from your supervisor. Your colleague is ill and your supervisor wants you to take on the colleague's work. The company newsletter needs to be finished by Friday and is a work package consisting of several tasks. You jot the names of the new tasks and the estimated hours on a sticky note:

- Write article about new office, 4 hours
- Write article about how the sales office works, 4 hours
- Put the newsletter together, 3 hours

You can now enter the new tasks in Outlook.

1. Create a new task in your **Tutorial Tasks** folder in Outlook and enter the following information:
    - On the **Task** tab, enter "Article about new office" in the **Subject** box.

- On the **Taskline** tab, enter "4h" in the **Total work** box.
- You prefer to get your own work done first, so enter a low **Priority (A1)** value of **B10**.
- Click **Save & Close**

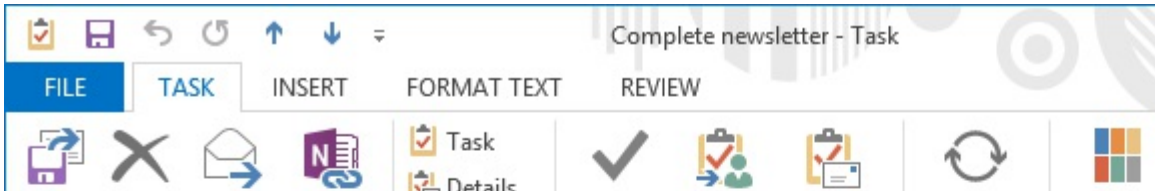
2. Create a second task and enter the following information:
   - On the **Task** tab, enter "Article about sales office work" in the **Subject** box.
   - On the **Taskline** tab, enter "4h" in the **Total work** box.
   - It doesn't matter in which order you do this and the previous task, so you enter the same **Priority (A1)** value of **B10**.
   - Click **Save & Close**
3. Create a third task and enter the following information:
   - On the **Task** tab, enter "Complete newsletter" in the **Subject** box.
   - On the **Taskline** tab, enter "3h" in the **Total work** box.
   - Finishing off the newsletter must happen after the previous 2 tasks have been completed, so you enter a **Priority (A1)** value of **B20** to ensure this.
   - Click **Save & Close**

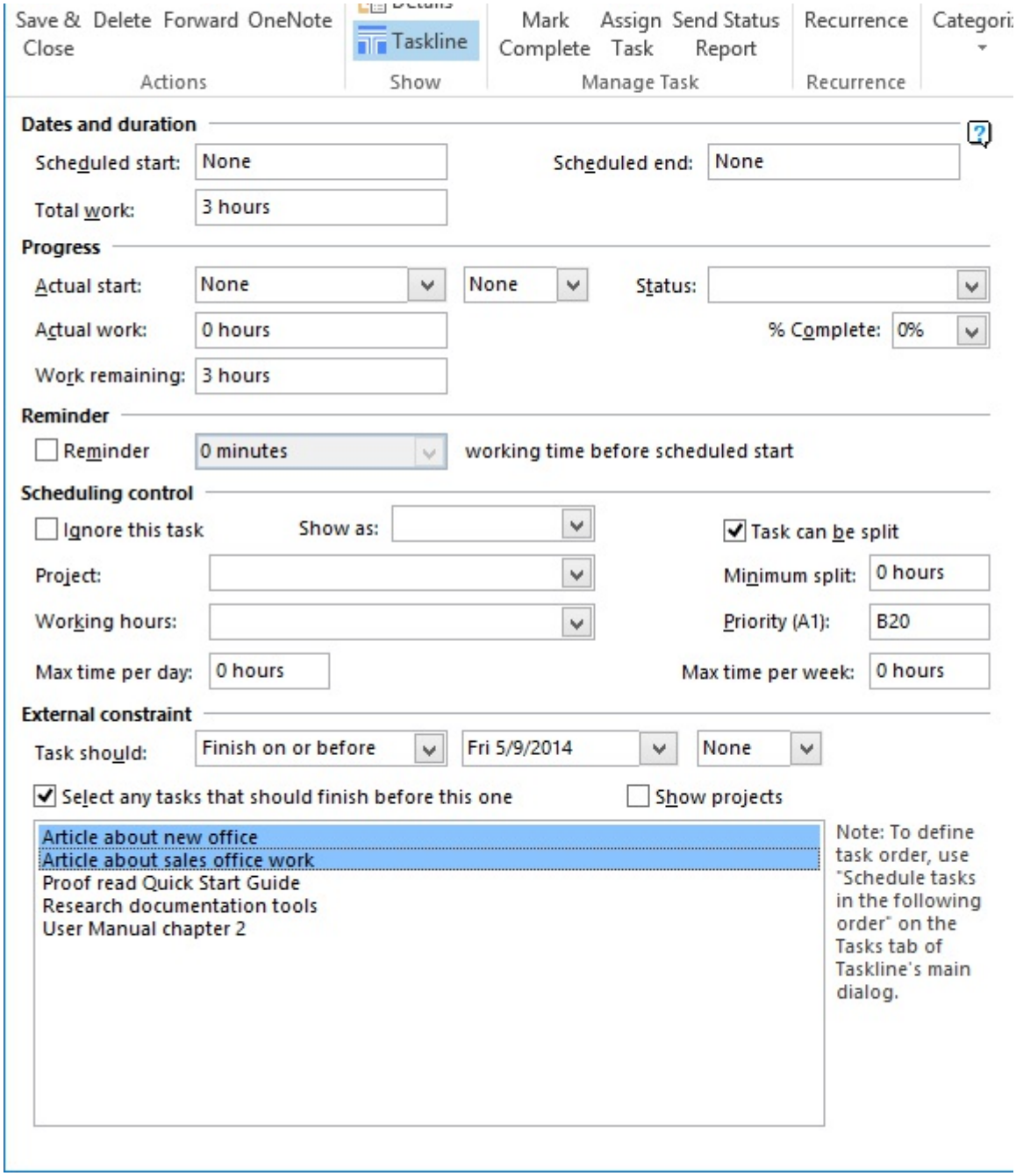
Your task list should now look like the screen shot below. As usual, the dates have been removed from the screen shots:

SUBJECT	TOTAL WORK	A1	SCHEDULED START		SCHEDULED END	
Click here to add a new Task						
User Manual chapter 2	2 days	A10	Mon	9:00 AM	Tue	5:00 PM
Proof read Quick Start Guide	3 hours	A20	Wed	1:00 PM	Wed	4:00 PM
Research documentation tools	1 day	A30	Wed	4:00 PM	Thu	4:00 PM
Article about sales office work	4 hours	B10	None		None	
Article about new office	4 hours	B10	None		None	
Complete newsletter	3 hours	B20	None		None	

Now you add the same deadline to all three of the tasks that you have just added. This makes sure that all three tasks are scheduled to be completed by the same date.

1. In Outlook, double-click the **Complete newsletter** task, if the task is not still open.
2. On the **Taskline** tab, in the **Task should** box, click **Finish on or before**.
3. In the **Enter Date** box, just to the right of **Finish on or before**, click the down arrow and enter the date corresponding to Friday of this week. Leave the time blank, as you are happy for the tasks to be finished any time on Friday.
4. The selected deadline applies only to this one task. To apply the deadline to the other tasks in the work package too, click the **Select any other tasks also affected by this constraint** check box.
5. In the list, click "Article about new office" and "Article about sales office work". This makes sure that these two tasks are scheduled for completion before the final task: "Complete newsletter". The Taskline task form should now look like the following picture:



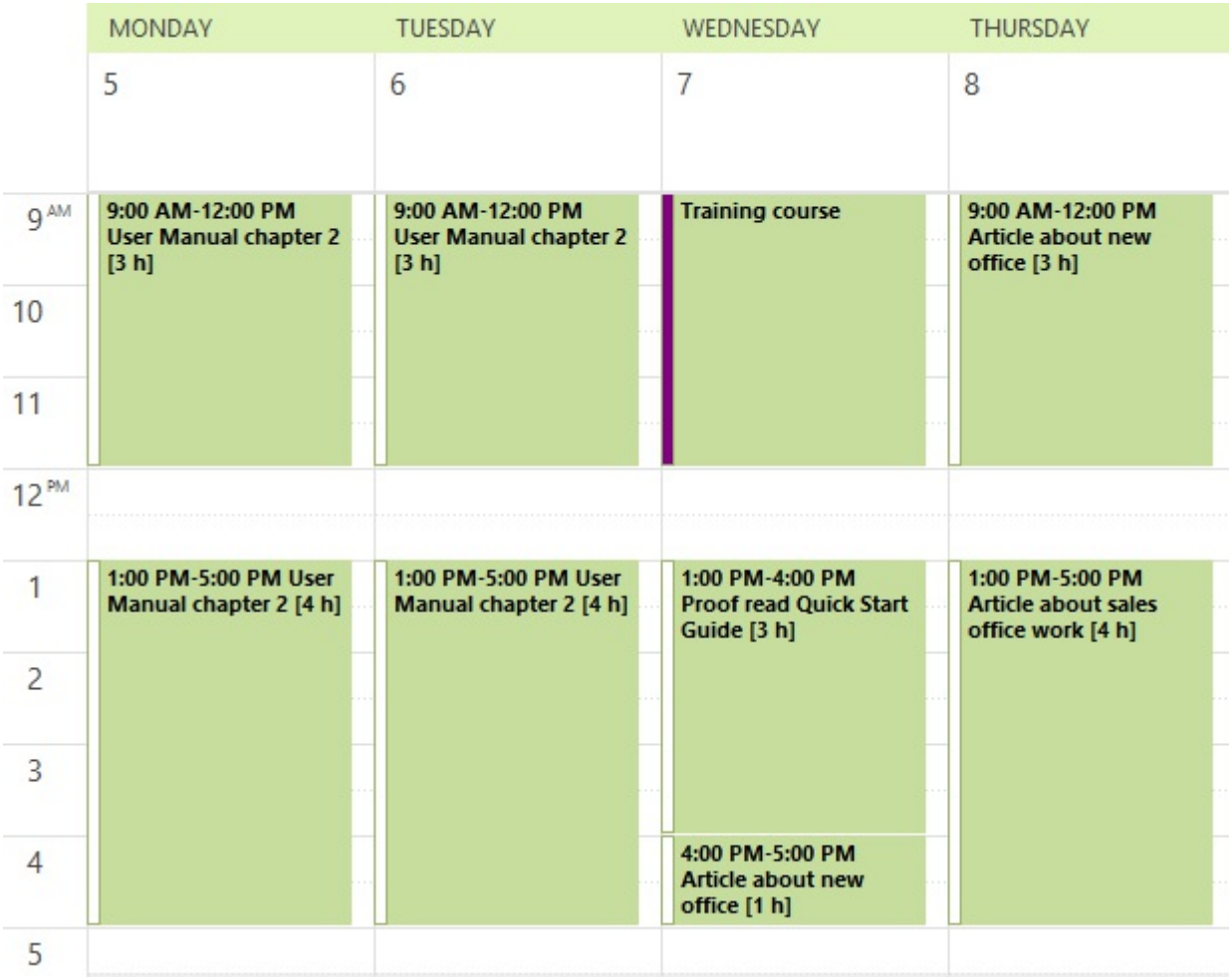


6. Click the **Save & Close** button.

To see the results of the previous steps, click **Reschedule** to run Taskline again. Click **OK** on the **Summary of Task Schedule** dialog box. Taskline automatically adjusts the existing tasks to allow for the new work and the new deadline:

Notes

- The tasks "Article about sales office work" and "Article about new office" were assigned equal **Priority (A1)** values. Thus Taskline can schedule these in any order and your results might have these two tasks swapped.
- Some tasks have been scheduled for the following week. However, screen shots in this tutorial will only show the first week's work.



Tip

- Task constraints, such as deadlines, override task ordering, but only if this is necessary for the constraint to be met. In our example, "Research documentation tools" gets scheduled last, even though it has a higher priority than the newsletter tasks. This is so that the newsletter deadline can be met. In general, you don't need to worry about work deadlines when setting task order – Taskline will worry about this for you.

The next tutorial activity shows how to define and use more than one set of **Working hours**.

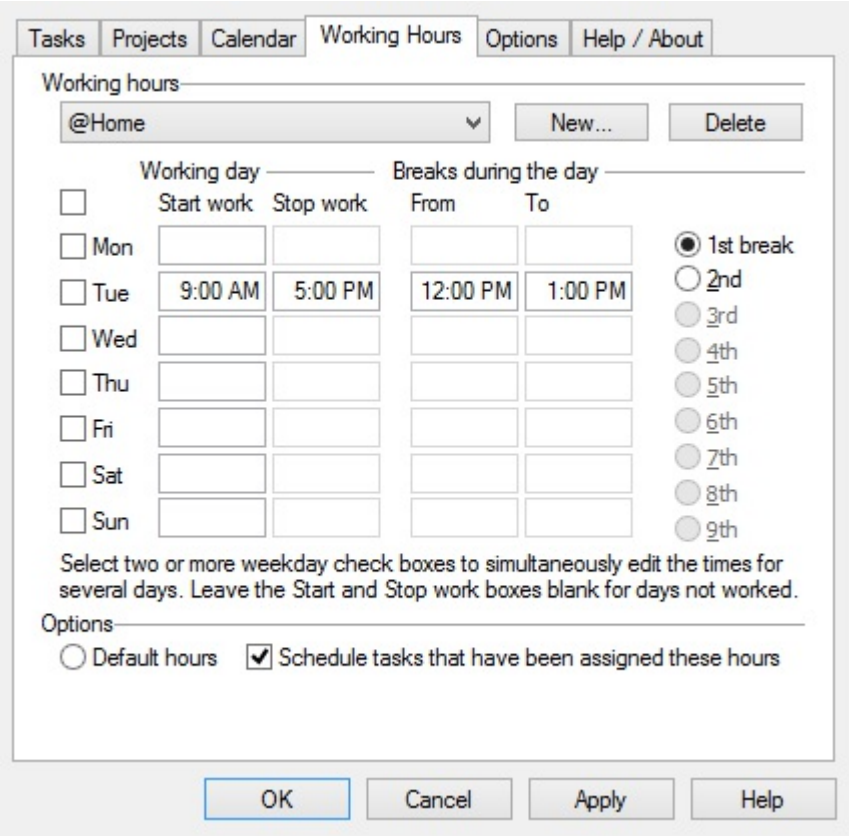
Scheduling Different Tasks to Different Time Slots

Let's assume that you work at home on Tuesdays. You decide to do your documentation work in the office, because you often need to talk to other people. You also decide that you would like to do your "Research documentation tools" task at home, where you get fewer interruptions. To handle this requirement in Taskline, we create a 2nd set of **Working hours** for just Tuesdays:

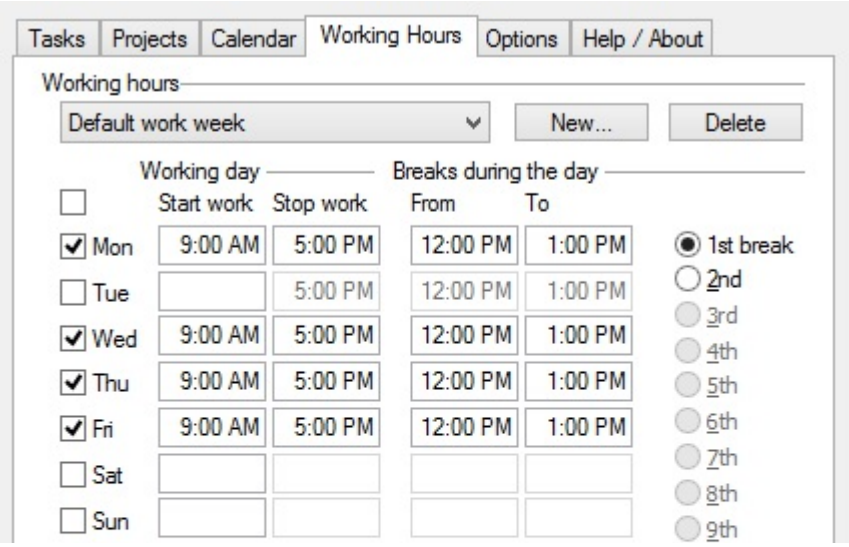
1. Click Settings (on Outlook 2007, click Taskline) to start Taskline.
2. Click the **Working Hours** tab.
3. Click the **New** button, which is near the top of the dialog.
4. On the **New Working hours** dialog:
    - Enter "@Home" in the **Enter a unique name** box.

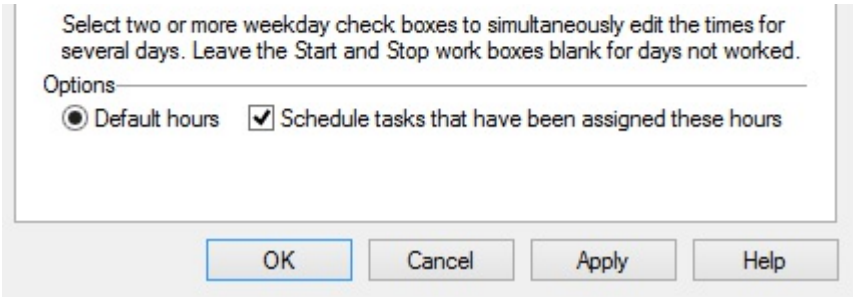
- Select the **Start with empty settings** option.
- Click **OK**.

5. You will now see the empty "@Home" **Working Hours** tab. On the row for Tuesday, enter "9" in the 1st box, "5" in the 2nd box, "12" in the 3rd and "1" in the 4th. You have now defined the "@Home" hours and any task assigned these hours will only get scheduled on a Tuesday. Your **Working Hours** tab should look like the screen shot below:



6. In the **Working hours** drop down list, select "Default work week".
7. Deselect the **Tue** check box and then select and delete the text in the **Start work** box for Tuesday. This means that any task assigned the "Default work week" hours will not get scheduled for a Tuesday. Your **Working Hours** tab should look like the screen shot below:



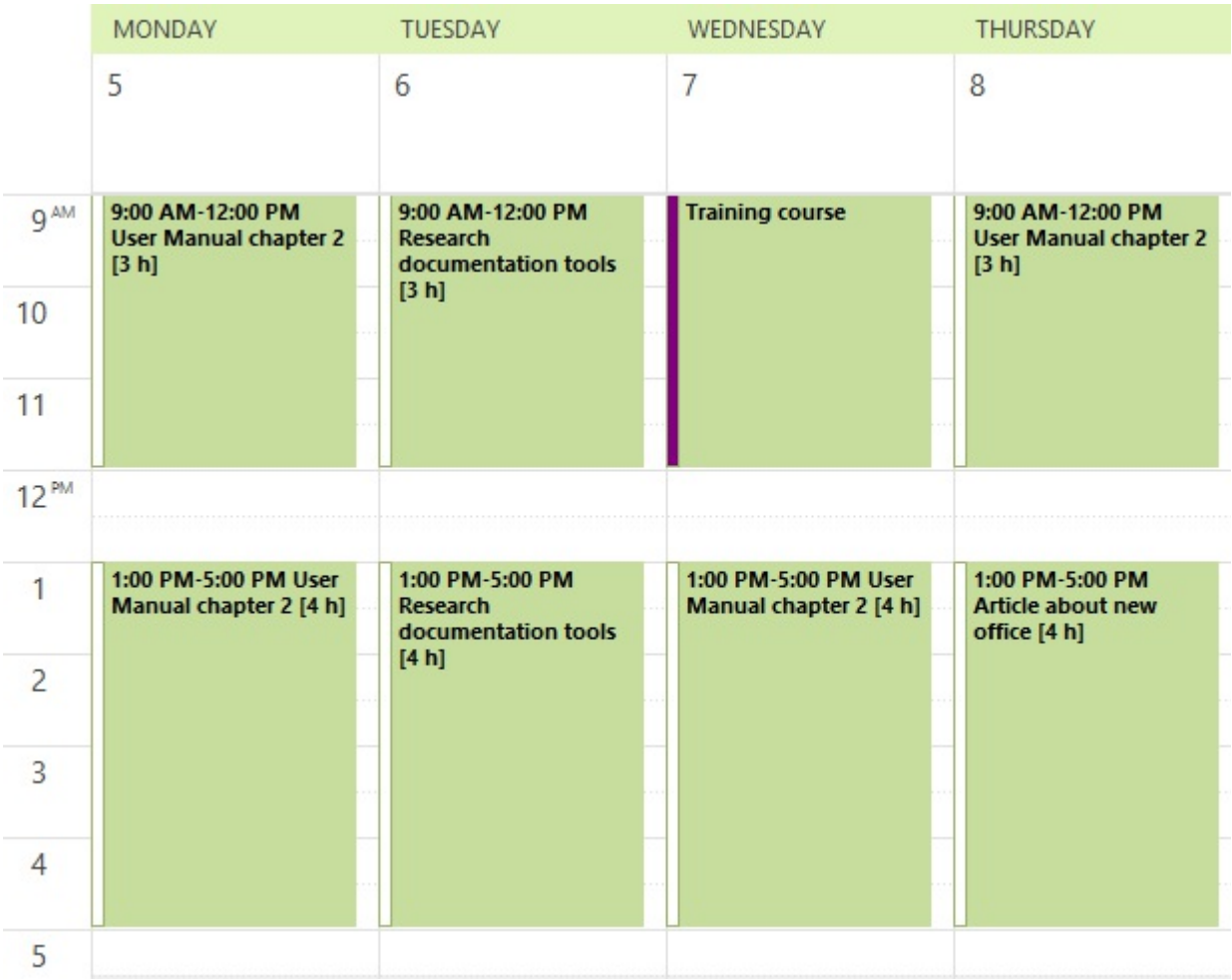

Select two or more weekday check boxes to simultaneously edit the times for several days. Leave the Start and Stop work boxes blank for days not worked.
Options
Default hours
Schedule tasks that have been assigned these hours
OK
Cancel
Apply
Help

8. Click **Apply** to save your changes.

Having defined the "@Home" hours, we now need to tell the "Research documentation tools" task to use these hours:

1. Open the "Research documentation tools" task by double clicking it.
2. On the **Taskline** tab, in the **Scheduling control** section, select "@Home" in the **Working hours** drop down list.
3. Click **Save & Close**

Finally, reschedule your tasks by clicking **OK** on Taskline's main dialog. Your results should look like the screen shot below. "Research documentation tools" has moved to Tuesday and other tasks have been shunted to accommodate this:



Tips

- In this example, we explicitly assigned the "@Home" **Working hours** to the task.

However, in many cases Taskline will automatically locate and use the correct hours for you. If a task's **Working hours** are blank, then Taskline will look at that task's **Categories** and **Project**. If there exists some **Working hours** with exactly the same name as an assigned **Category** or **Project**, then Taskline will automatically use those hours. For example, if we had a **Category** called "@Home", and we had assigned that **Category** to our "Research documentation tools" task, then Taskline would have automatically used the "@Home" hours; there would be no need to explicitly assign them.

- If a task has **Working hours** left empty, and there is no **Working hours** match on **Category** or **Project**, then Taskline will use whichever hours have **Default hours** selected on the **Working Hours** tab. After installation, these hours are "Default work week".
- Being able to define more than one set of **Working hours** is a powerful feature and there are many uses for it. See Using Different Working hours for Different Tasks for more ideas and suggestions.

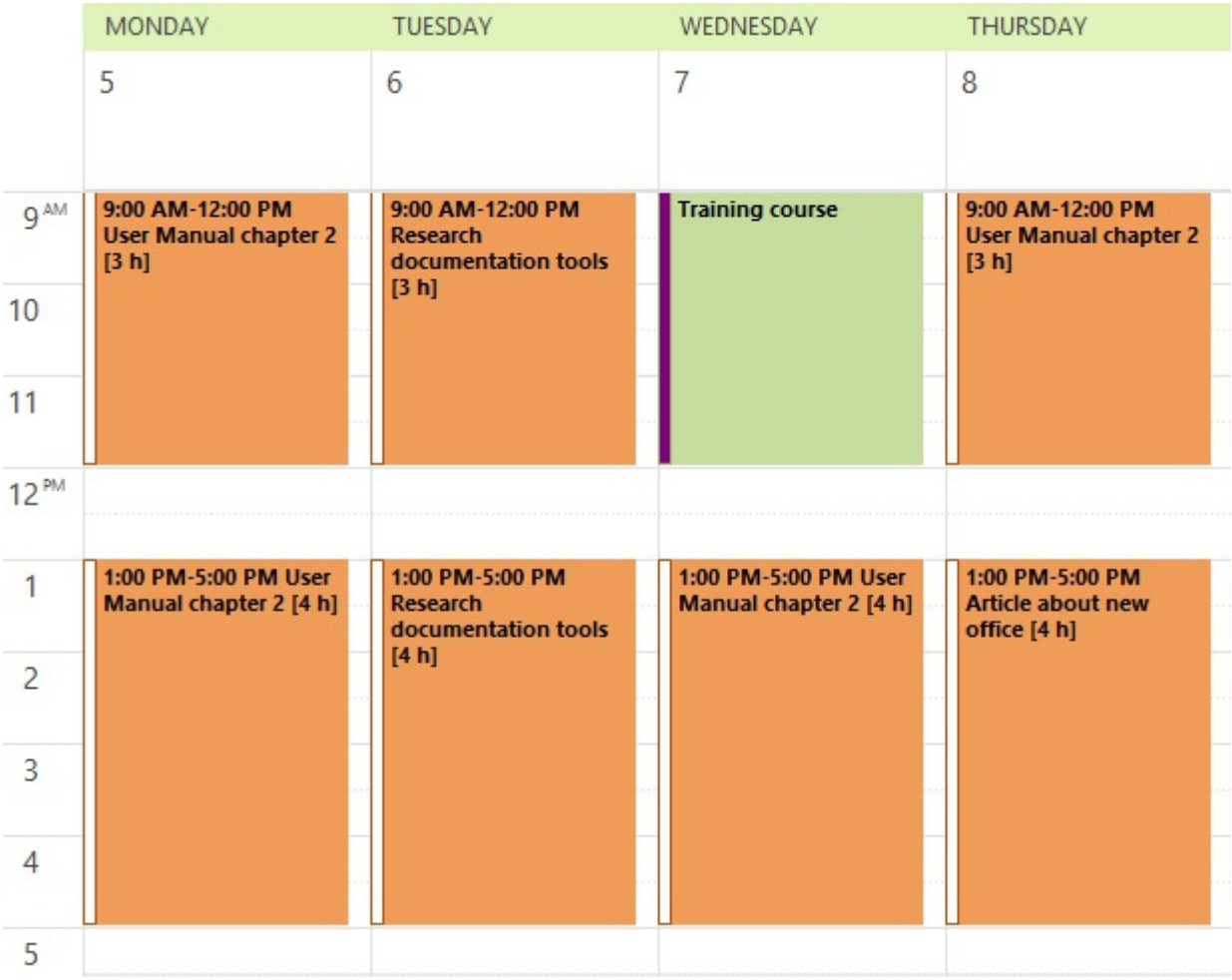
The next activity in our tutorial shows how to customize the color of calendar task entries, for example to distinguish task entries from regular appointments.

Distinguishing Task Entries on Your Calendar

Taskline allows you to give different calendar task entries different colors. Example uses of this feature are to distinguish calendar task entries from regular appointments, or to highlight task entries of a certain **Project** or with a certain **Status** value.

In our tutorial example, you decide that you'd like to distinguish calendar task entries from your appointments by using a specific color. You want to see all tasks that haven't been started in orange and all work that has been completed in gray (completing tasks will be looked at in the next section of the tutorial).

1. Click Settings (on Outlook 2007, click Taskline) in Outlook.
2. Click the **Calendar** tab and then the **Define Colors** button to display the **Calendar Task Entry Colors** dialog.
3. Click **<Not Started>** in the **Category Etc** column. If the **Category Etc** column is empty, select the **<Not Started>** entry from the drop down list just beneath the column.
4. In the **Color** dropdown list, click the color that you want to apply to task entries that have not been started. In this case, click orange. To insert this new rule into the list, click the **Insert New** button. However, if the **<Not Started>** rule already existed within Taskline, click on a blank area within the list to update the existing rule.
5. Repeat the previous step, but choosing **<Completed>** for **Category Etc** and gray for the color. Again, click the **Insert New** button if you created a new rule, or click on a blank area within the list to update an existing rule.
6. Click **OK** to close the **Calendar Task Entry Colors** dialog.
7. Click **Apply** to save your changes and update the Calendar colors; there is no need to run Taskline again in this case. Now click **Cancel** to close Taskline's dialog. Now all Not Started tasks display the color orange on your Outlook Calendar.



Tips

- You can also visually distinguish calendar task entries based on **Category**, **Project**, **Working hours**, **Priority** (High/Medium/Low), **Priority (A1)** (letter only), **Overdue** and **Pinned**.
- To prevent the creation of calendar task entries for one or more **Category Etc** values, you can select from the color drop down list.

Note

- **Calendar Task Entry Colors** are only shown if calendar task entries do not have any **categories** assigned. Because, in this latter case, Outlook prefers to use the **category** color.

The final activity in our tutorial example describes how you can mark tasks as completed.

Accounting for Completed Work

Taskline allows you to track and view the work that you complete both on your Outlook calendar and your Outlook task list. Marking a task as Complete also tells Taskline to stop scheduling that task for a future date.

You'd like to keep a record in your calendar of what you did, and when. We need to change a setting on Taskline to enable this:

1. In Outlook, click Settings (on Outlook 2007, click Taskline) to display

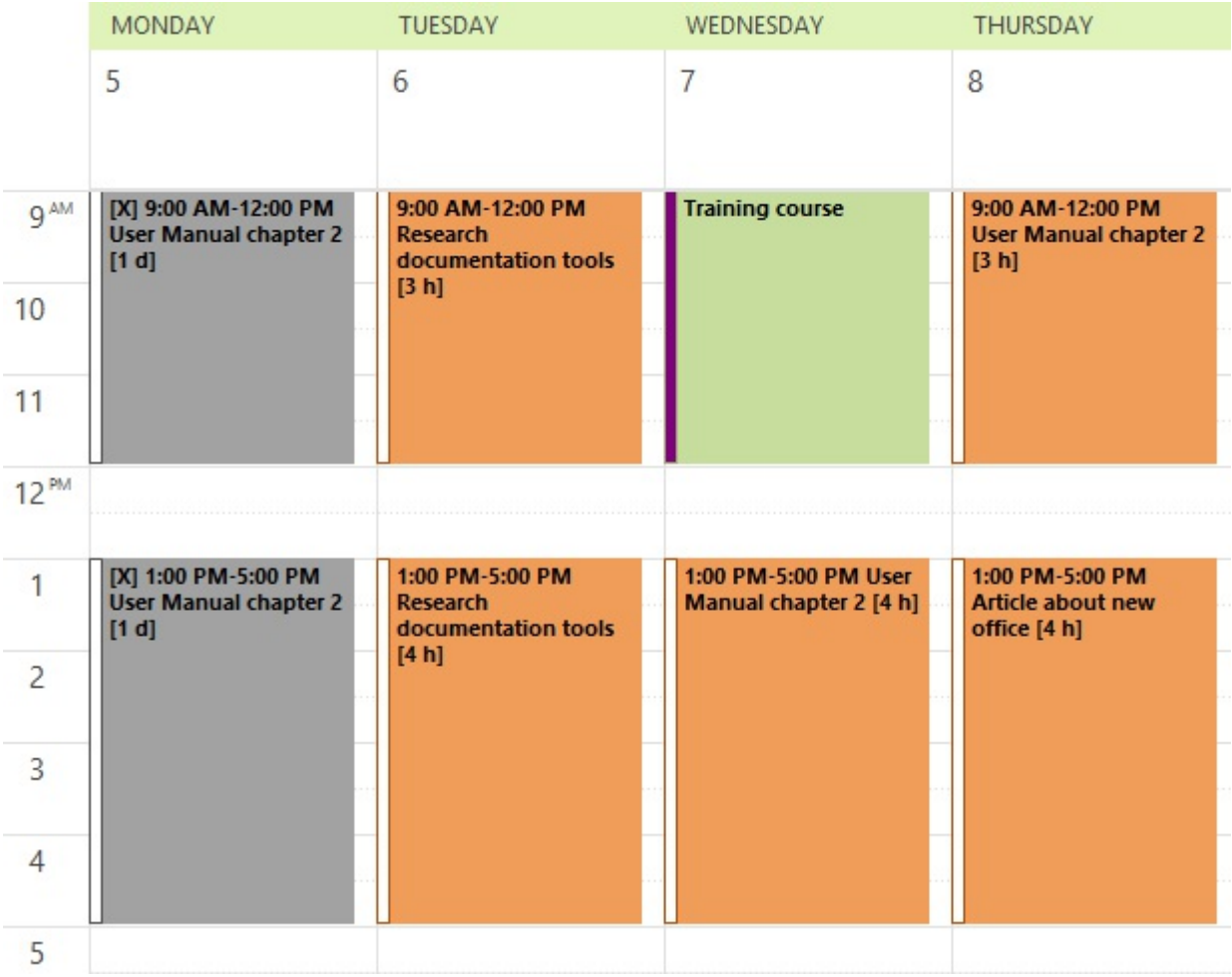
Taskline's main dialog.

2. Click the **Calendar** tab.
3. Select the **Keep a record of completed work** check box, if necessary.
4. Click **Apply** to save this change and then **Cancel** to close the Taskline dialog.

In our tutorial example, it is now Monday evening and you want to update your schedule for the rest of the week. During Monday you did 7 hours work on the "User manual chapter 2" task, as planned. However, you now think that this task involves 16 hours work and not the 14 hours you originally estimated. You update the task to reflect your progress and latest estimate as follows:

1. In Outlook, open the **Tutorial Tasks** folder.
2. Double click the "User manual chapter 2" task to open it.
3. On the **Taskline** tab:
   - Change **Total work** from "2d" to "16h".
   - In the **Actual Work** box, enter "1d" to account for the time you have spent on this task so far. Press the Tab key on your keyboard to update the form. You will see that **Work remaining** gets updated to show 9 hours remaining and that **Status** gets updated to show **In Progress**.
   - Click **Save & Close**.

Your **Tutorial Cal** folder will immediately update to show the task progress you have just entered. This is shown in gray, because of the **Calendar Task Entry Colors** setting we entered in the previous tutorial activity:



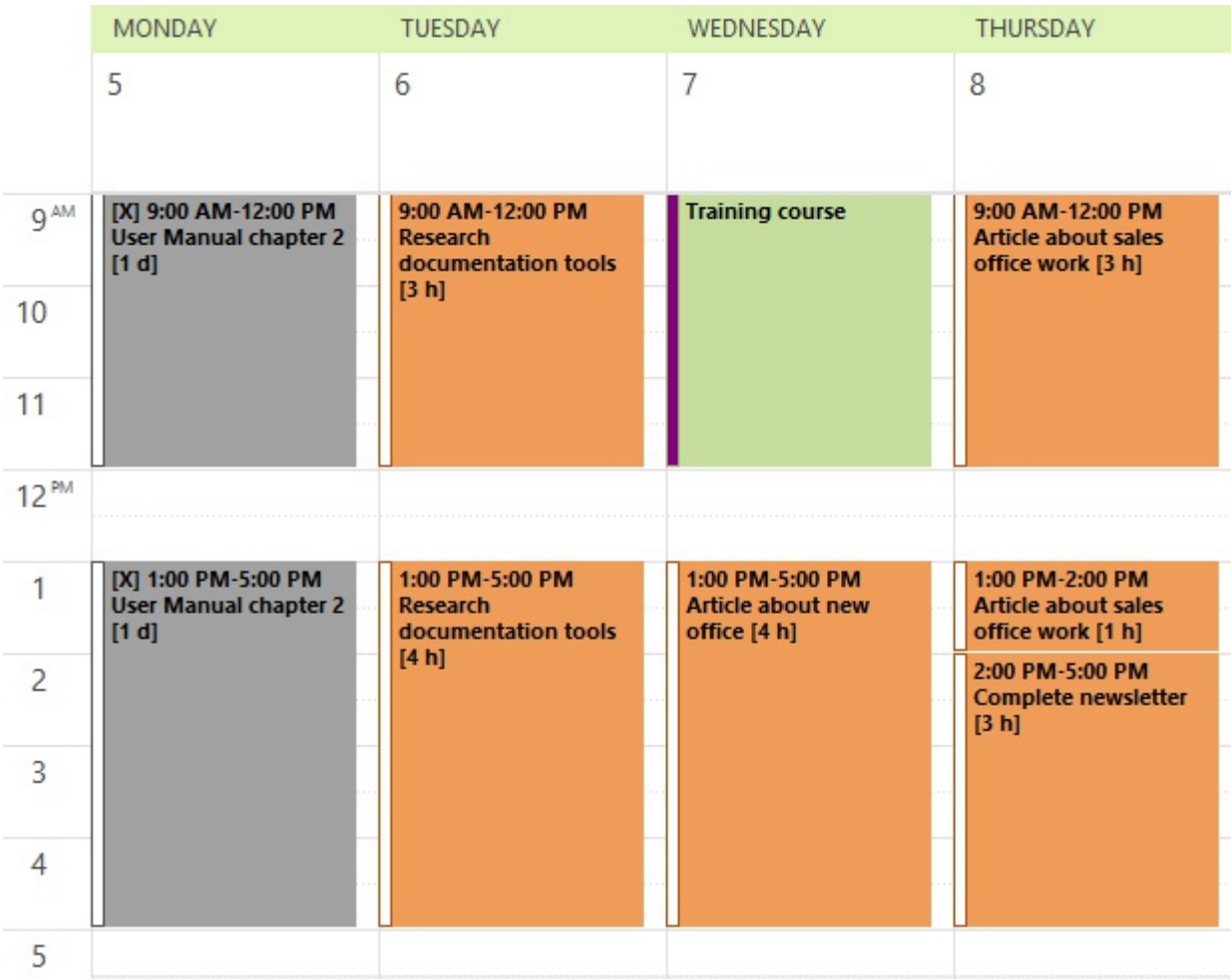
We now need to reschedule our remaining work to take account of the extended "User manual chapter 2" task:

1. Click Settings (on Outlook 2007, click Taskline) to start Taskline.
2. On the **Tasks** tab of Taskline's dialog, move the **First task starts at** date forward one day from Monday to Tuesday. You can do this either by typing in your change, or by clicking the down arrow and selecting a new date.

   Note

   - When you change the date, Taskline might change the time, so retype the time if necessary so that it remains at "9 AM".

3. Click **OK** to have Taskline reschedule your work. You should see the following results (some tasks are scheduled for the following week, but as usual our screen shots show only the first week):



Tip

- You can also open a calendar task entry and mark it as **Complete**. Sometimes this is more convenient than recording progress on the task.

Now that you have completed basic tasks in this tutorial, you are ready to start using Taskline to manage your work tasks quickly and efficiently. You now know how to complete the following activities:

- Enter your work week.
- Plan tasks.
- Schedule tasks.
- Customize the Tasks folder view to display information from Taskline.
- Show tasks in your Outlook Calendar.
- Identify the status of different tasks on your Outlook Calendar.
- Define and use multiple **Working hours**.
- Adjust your work schedule when you complete tasks.

The Planning Your Work topic is now recommended further reading. It offers useful guidelines on how to plan your work effectively.

Some other topics you might now like to explore, which were not covered in this tutorial, are:

- Organizing Completed Tasks
- Recording Task Progress via Outlook's Calendar
- Using Projects
- Preparation and Travel Time on Appointments
- Changing how Taskline Splits Tasks during Scheduling
- Pinning to Manually Override some or all of Taskline's Scheduling
- Giving Calendar Task Entries Colors
- Defining the Subject of Calendar Task Entries

Tidy Up

1. On the **Tasks** tab on Taskline's dialog, reset the **Schedule the tasks in** folder back to the folder that contains your main task list.
2. On the same tab, you may also wish to select the **Default to current date and time** check box. This tells Taskline to automatically use the current date and time as the starting point for your schedule. Selecting this check box saves you having to continually select a new date.
3. On the **Calendar** tab of Taskline's dialog, reset the **My appointments are in** and **Write task entries to** folders back to your main calendar.
4. You may now wish to delete the **Tutorial Tasks** and **Tutorial Cal** folders you created at the start of this tutorial, by dragging them to the **Deleted Items** folder.
5. On Taskline's **Advanced Options** dialog, select the **Reset "Don't tell me about this again" messages** check box and click **OK**. This is so that any messages that were permanently dismissed, for the purposes of the tutorial, are now shown again.

Introduction to Outlook Tasks and Taskline

Planning Your Work

If you have a large amount of work to do, you generally need to plan the execution of that work, so that you know:

1. What you should be working on at any given moment.
2. When you can expect to get current and future work finished.
3. Whether you can meet all of your deadlines.
4. What effect taking on new work will have on existing tasks.
5. Whether you're behind or ahead of schedule. If you're behind schedule, you'll want to know as soon as possible, because the later you leave corrective action the more difficult it is to remedy the situation.

Planning your work is called Work Scheduling or Task Scheduling, and is an example of good Time Management.

The first stage in work scheduling is to break your work down into small chunks, or tasks. Each task should represent a specific part of your work. It should be short in duration — ideally just a few hours and certainly no more than a few days. For example, if you had to design a new expenses form, you might split that item of work down into 1) Consulting current users of the form to get their improvement suggestions, 2) Collating feedback, 3) Creating the new form design, and 4) Getting approval for the new design.

Splitting up your work into short tasks has two advantages:

- It increases the accuracy of your work schedule, since the shorter a task is, the more accurate your time estimate will generally be.
- It makes it easier to know whether you're on schedule, since you'll know which tasks should have been completed by now. For example, if you're part way through an 18 day task, it's difficult to know whether you're on schedule, because you only have subjective means of measuring your progress. But if you had split the task up into six three-day tasks, and you've completed the first two tasks, you'll know in this latter case that you're exactly one third of the way through your work.

You cannot predict all tasks in advance and consequently you should make an allowance in your schedule for unpredictable or spontaneous tasks and events, such as phone calls. Working on unscheduled tasks can result in unnecessary pressure, because it almost inevitably means that you get behind with your scheduled work. Building in some contingency (or slack time) into your schedule is a simple way to address this very common problem. You could do this by adding a day time break to represent the contingency, for example. Over-estimating the **Total work** for some of your tasks is another good method.

Another issue to consider is whether it is correct to omit from your schedule tasks that might be too short to schedule individually. For example, you can't schedule in every phone call. However, although an individual phone call may take up only a very small amount of time, collectively this might not be the case. If you find, for example, that you spend 30 minutes per day on the phone, you should schedule yourself 30 minutes each day as a consequence. You could do this using a recurring appointment, or by entering a 30 minute day time break (phone calls are not a break, but this is a quick and convenient way to reserve daily time in your schedule).

You should also consider scheduling yourself some personal or "thinking" time during the day, perhaps by entering the time you start work slightly later than is actually the case.

Once you have a set of tasks with time estimates, Taskline can create a time schedule for you, so that you get to see the big picture.

Next: Setting Your Working hours

Starting Taskline

Click Settings in Outlook (on Outlook 2007, click Taskline) to start Taskline and display the Taskline dialog.

Setting Your Working hours

You need to tell Taskline what hours you work so that it can schedule your tasks correctly. How you do this depends on whether you are using Taskline Professional or Standard editions.

Tips

When setting up your working week, consider the following important points:

- You cannot predict all tasks in advance and hence you should make an allowance in your schedule for unpredictable or spontaneous events, such as phone calls. Build some contingency (or slack time) into your schedule. You could do this by adding a day time break to represent the contingency, for example. Over-estimating the **Total work** for your tasks is another good method.
- Consider planning some personal or thinking time at the start of the day, perhaps to plan the day's work. You could do this by entering a start work time slightly later than the time you actually arrive at work. Similarly, you can schedule thinking time at the end of the day, perhaps to plan the next day's work.

Professional Edition

Taskline Professional Edition allows you to define several different sets of working hours. For example, you might wish to plan your work tasks during the day and your personal tasks at evenings and weekends, in which case you would define one set of hours for work tasks and another set for personal tasks. You give each set of hours a different name, such as "Office Hours," and these names are displayed in the drop down list at the top of the **Working Hours** tab.

To enter your working hours, click the **Working Hours** tab on Taskline's main dialog, then do one of the following:

To Choose the Working hours You Wish to View or Edit

Select the hours from the drop down list at the top of the **Working Hours** tab.

To Set the Hours You Work

- For each day you intend to work on your tasks, enter the time you intend to start working in the **Start work** box and the time you intend to finish in the **Stop work** box.
- If these boxes are left blank, Taskline assumes that no work is done for the current working hours on that day.

Tip

- A time of 23:59 will leave the last minute of the day unworked. To work this last minute, use 0:00 for midnight.

To Set Day Time Breaks, Such as Lunch Breaks

- Enter break start and end times in the **From** and **To** boxes for each day you work.
- If these boxes are left blank, Taskline assumes you work with no breaks on that day.
- You can define up to 9 breaks per day. Use the radio buttons to the right of the **From** and **To** boxes to select which break you wish to view or edit.

To Edit Several Days in One Operation

- You can edit the times for multiple days in a single operation. To do this, select the appropriate day check boxes on the left side of the dialog tab.
- Selecting or deselecting the check box at the head of the column will select or deselect all the days of the week.
- Any changes you make in any time box on a day with a selected check box will have that same change applied to all the selected days.

To Create an Additional Set of Working hours

- Click the **New** button to display the **New Working hours** dialog.
- Enter a unique name for the hours and choose whether to create an empty set of hours or to copy an existing set.
- Click **OK** to create the new hours.

To Delete a Set of Working hours

- Select the hours you wish to delete from the drop down list box and then click the **Delete** button.
- You cannot delete working hours that are currently assigned to one or more tasks – you must assign different working hours first.
- There must always be at least one set of working hours defined, so if you delete the last remaining set, Taskline will automatically insert a new set of hours called "Default work week".

To Set the Default Hours

The default hours are used for tasks that have no working hours assigned. Exactly one of the defined working hours must be the default. To specify which one, select the **Default hours** radio button.

To Schedule or Ignore tasks Assigned the Current Hours

You can have Taskline ignore all tasks assigned the current working hours by deselecting the **Schedule tasks that have been assigned these hours** check box. Conversely, selecting the check box will mean that the tasks are scheduled.

To Set Your Working hours per Day and Week

Taskline also needs to know the number of working hours in a day and in a week. Outlook and Taskline use this information to convert days and weeks to hours, and vice versa. These settings are contained within Outlook. To view or change them:

- Outlook 2007 – click **Tools** → **Options** to display the **Options** dialog. Click the **Other** tab and then the **Advanced Options** button. On the **Advanced Options** dialog, set **Task working hours per day** and **Task working hours per week** as appropriate.

- Outlook 2010 and 2013 – click **File** (**FILE** on Outlook 2013) → **Options** → **Tasks** tab. Set **Task working hours per day** and **Task working hours per week** as appropriate.

Most of the time the values for the working hours settings are simple to calculate. For example, if you work from 9am to 12pm on Saturday and Sunday, you work 3 hours per day and 6 hours per week. However, if you don't work the same hours on each day, see If You Work Different Hours on Different Days.

To Change the Calendar Shading in Outlook

The calendar in Outlook has its own working week specified. This is simply used to set the calendar shading. On the **Working Week** view in Outlook's calendar, hours that are outside the calendar's working week are shaded differently. To change the calendar's working week, and hence change the calendar shading:

- Outlook 2007 – click **Tools** → **Options** → **Preferences** tab → **Calendar Options**. Then set **Start time** and **End time** as appropriate.
- Outlook 2010 and 1013 – click **File** (**FILE** on Outlook 2013) → **Options** → **Calendar** tab. Then set **Start time** and **End time** as appropriate.

To Assign Working hours to a Task

Select the hours from the **Working hours** drop down list on the **Taskline** tab of the task form in Outlook.

Tip

- Sometimes you may want tasks of a certain **project** or **category** to automatically have the same **working hours** assigned. For example, you may want tasks of **category** "Personal" to be scheduled for weekends. If you give the **Working hours** exactly the same name as a **Project** or **Category**, Taskline will automatically assign the **Working hours** to the task for you. More.

Standard Edition

In Taskline Standard Edition, you can only define one set of working hours. Furthermore, Taskline assumes that you work the same hours on each working day, although you can use recurring appointments to give some extra flexibility if this is not the case (this is discussed below).

To enter your working week, start Taskline. Then, on the **Working Week** tab, do one of the following:

Set Day Time Breaks, Such as Lunch Breaks

Enter break start and end times in the **From** and **To** boxes of the **I take breaks at the following times during the day** area. If this option is left blank, Taskline assumes you work with no breaks.

Set Which Days You Work

In the **I work on the following days** area, click the check boxes for each day you work. Clear the boxes corresponding to the days you don't work.

Set the Working Day

The **Working Day** area displays the time you start work, for example 8:30, and the time

you finish work, such as 17:00. These values are shared with Outlook and can only be changed from within Outlook. How?

Tip

- If you don't work the same hours each day, enter the earliest time you start work in the **I start work at** edit box, and the latest time you end work in the **I stop work at** edit box. Then enter recurring appointments to "blank out" the times when you're not working. You can change individual occurrences of recurring appointments, should you decide to leave early or work late on a particular day.

Set Your Working hours per Day and Week

Taskline also needs to know the number of working hours in a day and in a week. Outlook and Taskline use this information to convert days and weeks to hours, and vice versa. Most of the time the values for the working hours settings are simple to calculate. For example, if you work from 9am to 12pm on Saturday and Sunday, you work 3 hours per day and 6 hours per week. However, if you don't work the same hours on each day, see If You Work Different Hours on Different Days.

Tip

- You can change some options in either Taskline or Outlook. You can change the **Working day** and the **I work on the following days** settings in Outlook. Changing them in Taskline also changes the Outlook settings, and vice versa. For the changes to take effect in both applications, you must close and start Taskline and Outlook. To change the days you work, start and stop times, and other options, in Outlook, see the online Help for Outlook.

Next: Creating a New Task

Related Topics

Using Different Working hours for Different Tasks

If You Work Different Hours on Different Days

Working hours Tab

Working Week Tab

Creating a New Task

1. In Outlook, click the **Tasks** folder.
2. At the top of the table view, click a row and enter the details of the new task. The information varies according to the columns that you display in Outlook. You must enter information in the **Subject** column.
3. To enter information using the **Taskline** form, double-click a row. The **Taskline** form appears, displaying options from Outlook and Taskline. More.
4. On the **Task** tab, enter any settings that you may want.
5. On the **Taskline** tab, enter an estimated figure in the **Total work** box. Taskline requires this information to work with your tasks. More.
6. Click **Save and Close** on the form to save your changes and add the task to your Outlook task list.

Tips

- You can also set up reminders on the task form. If set, Outlook displays an automatic reminder when or before a task is due to start.
- Outlook does not restrict you to one **Tasks** folder. This is useful if you want to organize your tasks in a specific way. For example, you may wish to have current and future work in one tasks folder and past work in another.
- If you have a simple list of tasks created using a text editor, word processor or similar, you can have Taskline convert this list into Outlook tasks. How?

Next: Creating Tasks from Other Outlook Items

Related Topics

Creating New Outlook Folders

The Taskline Form in Outlook

Creating Tasks from Other Outlook Items

Creating a Task from an Appointment

To make it easier to plan your work in Outlook's calendar, as well as in the task list, Taskline includes an option to create a task from an appointment. Right click any standard Outlook appointment and click either **Create Task** or **Create Task and Pin**. Both options create a Taskline task from the appointment; attributes such as **Subject**, body text, **Categories** etc are also copied.

The appointment is also converted into a Taskline calendar task entry, i.e. it becomes exactly like other calendar task entries Taskline creates for each task when it runs. Be careful – like all calendar task entries, the converted appointment will be deleted and recreated the next time Taskline runs, so any changes or attachments will be lost. If you don't want this to happen, select the **Create Task and Pin** option instead. Or, if you want to create a task from an appointment and leave the appointment unchanged, use the standard Outlook feature of dragging the appointment onto your **Tasks** folder.

Note

- **Create Task** is only available for appointments that are not recurring.

Tip

- The task is automatically opened after it has been created. If you don't want this, deselect the **Open task after 'Create Task' from appointment** check box, which is on the **Advanced Options** dialog.

Creating a Task from an Email, Note or Contact Item

You can also quickly create tasks from Outlook emails, notes and contact items. Right click any of these items and click **Create Task**. A Taskline task will be created with many attributes, such as **Categories**, being automatically copied from the item to the new task.

If a task is created from an email, and that email has been flagged for Follow Up, the Follow Up date will be used to automatically set a **Finish on or before** constraint on the task.

Note

- Unlike the **Create Task** menu option on appointments, **Create Task** for emails, notes and contacts leaves the original Outlook item unchanged.

Next: Setting Total work

Related Topics

Creating New Appointments

The Taskline Form in Outlook

Setting Total work

Total work is your estimate of how long a task will take – effectively how much work it entails. It is the task's duration.

1. Open an existing task in Outlook, for example by double clicking it, or create a new task by double clicking a blank area of Outlook's task list.
2. On the **Taskline** tab, enter how long you think the task will take in the **Total work** box, which is set to 0 by default. If you don't yet have a **Taskline** tab, use the **Details** tab. You can enter the **Total work** as a number of minutes, hours, days or weeks; the abbreviations are m, h, d and w. For example, to set **Total Work** to 5 hours, you can type "5h" or "5 hours." When you have updated **Total work**, click **Save and Close**.

Tips

- If you wish to set the **Total work** values of several tasks in one step, you can add a **Total work** column to the tasks table view. How?
- Outlook converts large numbers of small time units to larger time units. For example, "120 minutes" converts to 2 hours, and 8 hours converts to 1 day, assuming that there are 8 working hours in the day. See Working Hours Per Day and Week for information on how to set the number of working hours in a day.
- Tasks with a **Total work** of zero are called milestones, or goals. Milestone tasks represent significant events, rather than routine work items. More

Next: Milestones

Related Topics

Progress: Working Through Your Task List

Milestones

Milestones

Milestones, or goals, are normal Taskline tasks with a **Total work** of zero. Milestone tasks represent significant events, rather than routine work items. An example might be finishing an important package of work, e.g "Phase 1 Completed." The **Summary of Task Schedule** report, displayed when Taskline has finished processing, lists the date of the next uncompleted milestone in your schedule, as well as other information.

Milestones mostly work in the same way as other tasks, with a few exceptions:

- When you create a task with 0 in the **Total work** box, the **Ignore this task** check box on the **Taskline** tab of the **Taskline** form is selected by default. You will need to uncheck this check box to have Taskline schedule the milestone.
- Taskline will not show milestones in the calendar unless the **Create all day events for milestones** option is selected on the calendar tab of Taskline's dialog.
- Milestones cannot be progressed using **Actual Work**, as they have no work to progress. You can set only milestones as **Not Started** or **Completed** – you cannot have a partially completed milestone.
- You can color milestones on the calendar differently, to highlight them. How?

Next: Defining the Order in Which Tasks are Scheduled

Related Topics

Giving Calendar Task Entries Colors

Defining the Order in Which Tasks are Scheduled

In most cases you will want your tasks to be carried out in a certain sequence. This may be just personal preference, or it may be a necessity, for example you can't bind the handouts into a booklet until you've photocopied them.

Use the **Schedule tasks in the following order** drop down list boxes, on the **Tasks** tab of the **Taskline** dialog, to control scheduling order. This simple system is used in place of complex logic links used by Project Management software. For tasks with constraints, such as a **Finish on** constraint, an additional method of using the **Taskline** task form to select all the tasks that are affected by the constraint can also be used. More about constraints.

Tasks can be ordered using more than one field. In this case, if tasks have the same values for the first field, then they are ordered according to the second field, and if they have the same values for the second field, they are then ordered by the values of their third field.

Taskline overrides the task order, if necessary, under the following conditions:

- Task constraints, such as a **Finish On** constraint, override task order, but only if this is necessary to make sure that the constraint is met. This allows you to forget about deadlines when setting the task order – Taskline keeps track of these for you.
- A task with a missed constraint, or a recurring task that has missed its recurrence date, is regarded by Taskline as overdue. Overdue tasks take priority over all others.
- Different tasks assigned different **Working Hours** can get scheduled out of order, because some time slots might only be available to certain tasks.
- If you have turned off **Task can be split** or if you have set **Minimum split** on a task, then it's possible that a higher priority task isn't able to use the first available free time slot, because it's too small. Thus the task will get scheduled in a later time slot, leaving the earlier one free for another (perhaps lower priority) task.

Note

- For tasks that have an external constraint and are part of a **Select any other tasks also affected by this constraint** selection, then the order of those tasks is rigidly adhered to. However, for reasons outlined above, you could still get gaps between such tasks and these gaps could get filled by other tasks, to give a more optimum schedule.

The task fields you can use to set the order in which tasks are scheduled are:

- **Natural order**. Tasks in an Outlook folder have a natural order. This is the order in which they are displayed when all sorting and grouping is switched off, and is the order you created the tasks in. By default, Taskline schedules your tasks in Outlook's **natural order**. In Outlook, you will need to turn off sorting and grouping, and preferably filtering too, if necessary, should you want to view your tasks in their natural order:
  - Outlook 2007 – Click **View** → **Current View** → **Customize Current View** menu option, then use the **Sort** and **Group By** buttons on the **View Summary** dialog box to set the **Sort Items by** and **Group items by** fields to **none**.
  - Outlook 2010 and 2013 – Click **View** (Outlook 2013 **VIEW**) ribbon → **View Settings** button to display the **Advanced View Settings** dialog. Then use the **Sort** and **Group By** buttons on this dialog to set the **Sort Items by** and

Group items by fields to **none**.

Having your tasks displayed in natural order and scheduled in descending natural order is often a very convenient way of working, because the order in which you see your tasks is the order in which Taskline schedules them. You can easily change this order by simply dragging the tasks up and down the view in Outlook.

Note

- Natural Order only works with the tasks shown in your selected Outlook Tasks folder. It cannot be used with Outlook's **To-Do Bar**/**To-Do List**.

Tip

- If you are viewing sorted tasks on Outlook 2007 only, you can make the order tasks are currently being displayed in the natural order. To do this, click the **Actions** → **Save Task Order** menu option.

- **Priority (A1)**. You can enter a letter from A-Z and an optional number from 0 to 99 to define **Priority (A1)** for tasks. Giving related tasks, for example tasks of the same project or category, the same **Priority (A1)** letter makes it easy to reprioritize the whole set of tasks in one step, by using the **Renumber or Re-letter Priority (A1)** dialog. More.

  You should consider leaving gaps between priorities, so that you can easily introduce a new task at a later date between two existing tasks. For example, you might give the first task that you want to do a task priority of B10, the second task a task priority of B20, and so on.

  Tips

  - **Priority (A1) Ascending** order means that A01 gets scheduled first and Z99 last.
  - Taskline automatically sets the **ABC** task field to contain just the letter of **Priority (A1)**. This allows you to group Outlook views by this letter.
  - You can also bulk change the priority of tasks. Click Settings (on Outlook 2007, click Taskline) → **Options** tab → **Renumber or Re-letter Task Priorities** button. You may wish to give groups of related tasks the same priority letter, so that the priority of the whole group can be changed in one go by using the **Renumber or Re-letter Priority (A1)** facility.
- **Priority**. This is the **Low/Normal/High** setting that Outlook uses. It is useful in that Outlook gives you symbols in the task table view showing the priority (↓ for low and **!** for high), but is limited in that only three settings are available. The **Priority (A1)** option on the **Taskline** tab of the **Taskline** form gives you much more flexibility in scheduling tasks by priority and reordering them easily.
- **Due Date**. The **Due** date is supported by standard Outlook tasks. Ordering by **Due** date can be useful if you have an existing task list to which you've already added **Due** dates. Ordering by **Due** date works slightly differently to other **Order by** options in that Taskline will not only order by this date, but will also try and make sure that the task is completed on or before the **Due** date.

  Tasks without **Due** dates are scheduled in no particular order, so you will probably need a secondary ordering method if you use **Order by Due date**.

  Ordering by **Due** Date is something of a legacy method. It is helpful if you want to get Taskline working quickly and you already have lots of **Due** dates on your tasks. Using a different ordering method and placing **Finish on or before** constraints on your tasks achieves a similar effect, and offers more flexibility than using a **Due**

date, because of all the constraint options available. More about task constraints.

- **Total work**. This is how long a task is expected to take. If, for example, you wanted to work on your shorter tasks first, then you would sort on **Total work.** More.
- **Status**. Status can be **Not Started, In Progress, Completed, Waiting On Someone Else,** or **Deferred.** Ordering on **Status** can be useful, because it is a way of pushing **Waiting On Someone Else** and **Deferred** tasks to the end of your list.
- **Subject**. Ordering your tasks by subject is useful if you prefix your tasks with a code or a priority.
- **Project**. Ordering by **Project** is a two step process:
  - On the **Tasks** tab of Taskline's dialog, select **Project** in the **Order by** list, then select **Ascending**.
  - On the **Projects** tab of Taskline's dialog, put the **Project List** into priority order, by selecting projects and using the **Move Up** and **Move Down** buttons.

Tip

- You will usually also need a second level of ordering when **Order by Project** is used. This is because you will need to set the order of the tasks within each project, as well as the order of the projects themselves.

- **Task priority**. This field defines the priority for tasks created with Taskline Version 2.0 and earlier. Use with Versions 2.1 and newer is not recommended. Unlike the **Priority (A1)** field, this field supports only numbers, not numbers and letters.
- **Custom fields**. You can also order your tasks by most custom Outlook tasks fields, also known as **User Defined Fields**. See below for more information.

Ordering Tasks by Outlook Custom Fields

To do this:

1. Click **Custom fields...**, which is the last entry in each **Order by**/**And then by** list. The **Custom Field Chooser** dialog will be shown.
2. Select the custom fields you wish to appear in the **Order by** drop down lists, then click **OK**.
3. The custom fields you selected will now appear in the **Order by** drop down lists. Now simply select them, as appropriate, just like any other fields.

Note

- Not all custom field types are shown in the **Custom Field Chooser** dialog. For example, it doesn't really make sense to order by Keywords. You can order by Text, Number, Currency, Yes/No, Date/Time, Duration and Integer fields.

Tip

- If you **Order by** one or more custom fields, and some tasks do not have values assigned to those fields, then those tasks will always go to the end of the task order, regardless of whether you choose **Ascending** or **Descending**.

Next: Setting When the First Task Should Start

Related Topics

Setting When the First Task Should Start

Using Projects

Setting When the First Task Should Start

You must tell Taskline where to start placing your tasks.

1. Start Taskline, for example by clicking the Settings (on Outlook 2007, Taskline) button in Outlook.
2. On the **Tasks** tab, do one of the following:
   - Type in a date and a time, for example "May 5 2014 9am", in the **First task starts at** box. Note that the date and the time must be separated by a space.
   - Enter only a date in the **First task starts at** box. If the time is omitted, Taskline adds the current time.
   - Click the **Default to current date and time** check box. Taskline then enters the current date and time for you. If this is outside normal working hours, it is rounded up to the start of the next working period. For example, if you work 8am to 5pm Monday to Friday, and you click this check box at 9am on Tuesday, Taskline enters 9am Tuesday for you. If you click this check box on Saturday, Taskline enters 8am next Monday for you.

     By default, the current time is also rounded up to the next 15 minute interval. For example, if the current time is 9:06am, Taskline will set 9:15am. You can control the amount of rounding by setting the **Round 'Default to current date and time' to next** option, which is on the Advanced Options dialog.
   - Click the arrow to the right of the **Date and Time** box. You can then choose a date from the calendar control. If necessary, you can click the year to choose a different year, and you can click the arrows to the left and right of the month to choose a different month. Once the calendar displays the correct month, select a date by clicking it. When you select a date, Taskline adds the time the working day starts to the end of the date.

Next: Scheduled start and Scheduled end

Related Topics

Defining the Order in Which Tasks are Scheduled

Task Constraints

Scheduled start and Scheduled end

When Taskline has finished scheduling your tasks, each one is assigned a start date and time and an end date and time. This information is stored in the **Scheduled Start** and **Schedule End** fields. More.

Scheduled start is the estimated or most likely start date for the task. For a new task, it is initially unset, but is recalculated each time you run Taskline. The Taskline calculation takes into account things like appointments in your calendar, the priorities of your tasks, and any constraints on them. As few people can predict work with 100% accuracy, for example a meeting might take longer than anticipated, you cannot usually start every task exactly on schedule. However, the **Scheduled start** date gives you a very good indication of when you are likely to start working on a task.

Scheduled end is the estimated finish date for the task. It is initially clear and is recalculated each time you run Taskline. The calculation takes the **Scheduled start** date and adds to it the task's **Total work.** Taskline then adjusts for your normal working week, such as your daily breaks and appointments in your calendar, to derive the most likely end date for your task. You usually do not finish your tasks exactly as scheduled, because of unanticipated interruptions or because the task simply took longer than the **Total work** estimate. However, the **Scheduled end** date gives you a very good idea of when you are likely to finish a task.

For a task that is part completed, **Scheduled start** shows when the remaining part of the task should be started, and **Scheduled end** shows when the task is due to be fully completed. For a completed task, **Scheduled start** shows when the task started.

By default, tasks that are not scheduled have their **Scheduled start**, **Scheduled end** and **Week commencing** dates cleared by Taskline. This makes it easy to see which tasks have been scheduled, and which have not. You can change this behavior by using the **Clear Scheduled start and Scheduled end if task not scheduled** setting, which is on the Advanced Options dialog. A task might not be scheduled because for example the **Ignore this task** check box is selected or perhaps because the project a task belongs to is not scheduled.

Tips

- You can add **Scheduled start** or **Scheduled end** columns to Outlook's task table view. How?
- You might want to sort the **Task** folder table view into **Scheduled start** order, so that the tasks are listed in the order in which you want to work. How? However, both displaying and scheduling the task list in **Natural Order** is often the most convenient way to work.
- In the task table view, Outlook regards uncompleted tasks with a **Due** date in the past as being overdue, and these are shown in red by default.
- You can tell Taskline to set the task **Start** and **Due** dates to keep them in step with the **Scheduled start** and **Scheduled end** dates. To do this, select the **Taskline should set the Start and Due dates to the Scheduled dates** check box, which is on the **Options** tab of Taskline's dialog. More. Note that Outlook's **Start** and **Due** dates can only show dates and not times. In contrast, **Scheduled start** and **Scheduled end** show both dates and times.

Next: Using Projects

Related Topics

Defining the Order in Which Tasks are Scheduled

Task Constraints

Predefined Outlook Views

Using Projects

On the **Taskline** tab of the task form in Outlook, you can assign a project name to each task. You do this by clicking on the **Project** drop down list, to select an existing project name, or by typing in a new project name.

There are several advantages to assigning projects to tasks:

1. It improves task organization. Giving a task a project name is useful for grouping together related tasks. One way of doing this would be to group your Outlook task view by **Project**. How?
2. With projects, you now have a second way of categorizing tasks, in addition to the standard Outlook method of **categories**. A **Project** describes a related set of tasks, for example all the work for one particular customer, or a description of a significant collection of work, such as an office relocation. **Categories** on the other hand refer to the type of work, such as administration, report writing, meetings etc. As a guide, **categories** tend to be fixed, while **projects** tend to change over time.
3. It allows you to schedule your tasks in **Project** order. To do this:
    i. Put the **Project List** into priority order, by selecting projects and using the **Move Up** and **Move Down** buttons.
    ii. On the **Tasks** tab, select **Project** in the **Order by** list, then select **Ascending**.

    Tip

    - You will usually also need a second level of ordering when **Order by project** is used. This is because you will need to set the order of the tasks within each project, as well as the order of the projects themselves.
4. If you have the **Show task summary when task reschedule is complete** check box selected, which is on the **Options** tab of Taskline's dialog, you will see a summary of work remaining for each project when Taskline has finished task scheduling.

On the **Projects** tab of Taskline's dialog, you can also:

- Have Taskline ignore all the tasks of one or more projects. On the **Projects List**, if the check box next to the project name is selected, Taskline will schedule that project. If it is deselected, Taskline will ignore it.
- Add new project names. Simply type the name in and click the **Insert New** button.
- Delete old project names. Taskline keeps track of all the project names you have used previously, so that you can select them from a list rather than type their names in. To permanently delete old project names that you don't intend to use again, select them and click the **Delete** button.

Note

- By default, Taskline stores the project name assigned to a task in an Outlook User Defined Field called **Project**. However, if the **ClearContext project compatibility** advanced option is selected, Taskline instead uses an Outlook custom field called **CC-TopicName**. This is the name used by the ClearContext® Outlook Add-In and so aids compatibility if you also have that Add-In installed.

Related Topics

Project and The Taskline Task Form in Outlook

Taskline Dialog Box Projects Tab

Introduction to Outlook Appointments and Calendars

About Appointments

You may well have many events happening that temporarily stop you working on your tasks – meetings, dental appointments, holidays, conferences, training courses and so on. Some of these may be one-offs, such as a training course, others may happen regularly, such as a weekly management meeting.

You should enter such events into Outlook's calendar, which is like an electronic diary. Outlook calls calendar entries **appointments**. When scheduling your tasks, Taskline checks your diary to see what appointments you have, and schedules your tasks around them. It can also be convenient for you to see all of your appointments etc listed in the calendar.

Taskline will only take into account appointments that have been set to show the time they occupy as **Busy**. Taskline will ignore appointments whose time has been set to be shown as **Free**. This is useful if you wish to mark events in your calendar that do not stop you working for any appreciable time, such as an important football match you might want to check the result of.

By default, appointments with **Show time as** set to **Out of Office** , **Tentative** or (for Outlook 2013 and later) **Working Elsewhere** are also taken into account by Taskline, i.e. tasks are scheduled around them. However, you can change this behavior using the **Ignore 'Out of Office' appointments**, **Ignore 'Tentative' appointments** and **Ignore 'Working Elsewhere' appointments** Advanced Options.

To change how an appointment's time is shown, open the Appointment form, by double clicking on an appointment, or right clicking on an appointment and selecting **Open** from the pop up menu. Choose your option from the **Show time as** drop down list. Alternatively, right-click the appointment and select **Show time as** from the pop up menu.

For more efficiency in planning your time, Taskline allows you to add time allowances before and after the appointments in your calendar. This helps when you need to allow for travel or planning time before or after an appointment. Taskline does not schedule tasks during these times. More.

Related Topics

Travel and Preparation Time on Appointments

Calendar Views

Creating New Appointments

Recurring Appointments

Showing Your Tasks in the Outlook Calendar

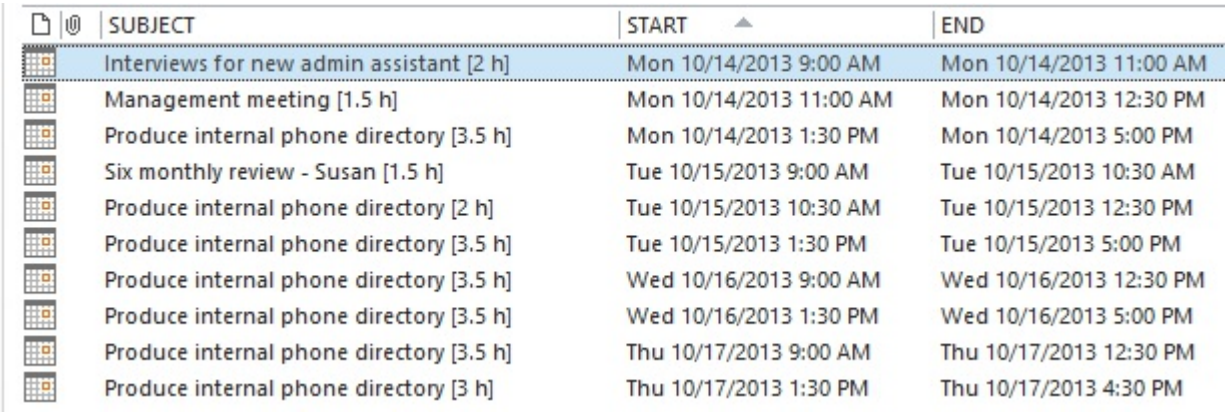
Calendar Views

There are several different calendar views available. The **Day**, **Week** and **Work Week** views are drawn to a time scale, which makes them particularly useful. The **Work Week** view shows all the days that you work, one day per column. The following example shows a three-day working week:

The **Month** view shows a square grid, with one day per square. All the appointments on a day will be listed in each square:

You can switch between calendar views by clicking on the appropriate buttons on the Calendar toolbar/ribbon.

You can also view appointments in a table format:



SUBJECT	START	END
Interviews for new admin assistant [2 h]	Mon 10/14/2013 9:00 AM	Mon 10/14/2013 11:00 AM
Management meeting [1.5 h]	Mon 10/14/2013 11:00 AM	Mon 10/14/2013 12:30 PM
Produce internal phone directory [3.5 h]	Mon 10/14/2013 1:30 PM	Mon 10/14/2013 5:00 PM
Six monthly review - Susan [1.5 h]	Tue 10/15/2013 9:00 AM	Tue 10/15/2013 10:30 AM
Produce internal phone directory [2 h]	Tue 10/15/2013 10:30 AM	Tue 10/15/2013 12:30 PM
Produce internal phone directory [3.5 h]	Tue 10/15/2013 1:30 PM	Tue 10/15/2013 5:00 PM
Produce internal phone directory [3.5 h]	Wed 10/16/2013 9:00 AM	Wed 10/16/2013 12:30 PM
Produce internal phone directory [3.5 h]	Wed 10/16/2013 1:30 PM	Wed 10/16/2013 5:00 PM
Produce internal phone directory [3.5 h]	Thu 10/17/2013 9:00 AM	Thu 10/17/2013 12:30 PM
Produce internal phone directory [3 h]	Thu 10/17/2013 1:30 PM	Thu 10/17/2013 4:30 PM

Consult Outlook's online help for details on creating Calendar Table views.

Related Topics

About Appointments

Creating New Appointments

Recurring Appointments

Showing Your Tasks in the Outlook Calendar

Creating New Appointments

There are several ways to enter a new appointment into Outlook's calendar:

- Enter the details of your appointment on the Appointment form. To get an appointment form for a new appointment:
  - In Outlook 2007, click **File** menu → **New** → **Appointment**.
  - In Outlook 2010 and 2013, click the **New Appointment** button on the **Home** (Outlook 2013 **HOME**) ribbon.
  - Or, for any Outlook version, simply double click a blank area of the calendar.
  - Or, again for any Outlook version, type **Control+Shift+A**.
- On a **Day**, **Week** or **Work Week** view, you can also click or drag to select a time period, and simply type in the subject of your appointment.

On the **Day**, **Week** or **Work Week** calendar views, you can edit the start and end time of your appointment by dragging its top or bottom up or down. For other views, you will need to double click the appointment (or right click and select **Open**) to get presented with the appointment form, then edit the times on the form.

If your appointment lasts all day, select the **All day event** check box on the appointment form. Outlook calls appointments that last all day **Events**. Events are only shown as small entries at the top of the **Day**, **Week** and **Work Week** views, but they still encompass the whole day. On the **Month** view, you can distinguish events by them not displaying start or end times. By default, Outlook marks the time taken by an all day event as **Free**. Taskline will not schedule tasks around calendar entries that have been marked as **Free**, therefore on the appointment form you may wish to change this setting to something else.

You should consult Outlook's documentation and online help for full information on how to work with Outlook's calendar. Only the aspects of the calendar most relevant to Taskline users have been discussed here.

Tip

- You can also create a Taskline task from a standard Outlook appointment. How?

Related Topics

About Appointments

Calendar Views

Recurring Appointments

Showing Your Tasks in the Outlook Calendar

Recurring Appointments

Recurring appointments represent appointments and events that occur more than once, according to some regular pattern. For example, every Friday from 9am to 10am. As well as being useful for normal appointments, you can use recurring appointments to model an irregular working week (How?), or to periodically schedule yourself some personal or "thinking" time during the day.

There are many ways to create recurring appointments. Only one quick way is documented here:

1. Go to the **Day** or **Work Week** view for the day you want your recurring appointment to begin.
2. Highlight (by dragging with the mouse) the time slot or slots that encompass your appointment.
3. Right-click the highlighted area, and select **New Recurring Appointment**.
4. Enter the recurrence pattern and the appointment details into the 2 forms that present themselves. You will need to consult the Outlook documentation for help with the **Appointment Recurrence** dialog options.

You can make an existing appointment recurring by opening it (to present the appointment form), and then clicking on the **Recurrence** toolbar button.

To delete one of the recurring appointments, but not the whole series, select the appointment and press the **Delete** key, or click the **Delete** toolbar button. In the **Confirm Delete** dialog, choose **Delete this one**. This is useful if, for example, your regular Friday management meeting is canceled this week, but is still scheduled for future weeks.

This is only a brief summary of recurring appointments. See the Outlook documentation for full details.

Related Topics

About Appointments

Calendar Views

Creating New Appointments

Showing Your Tasks in the Outlook Calendar

Showing Your Tasks in the Outlook Calendar

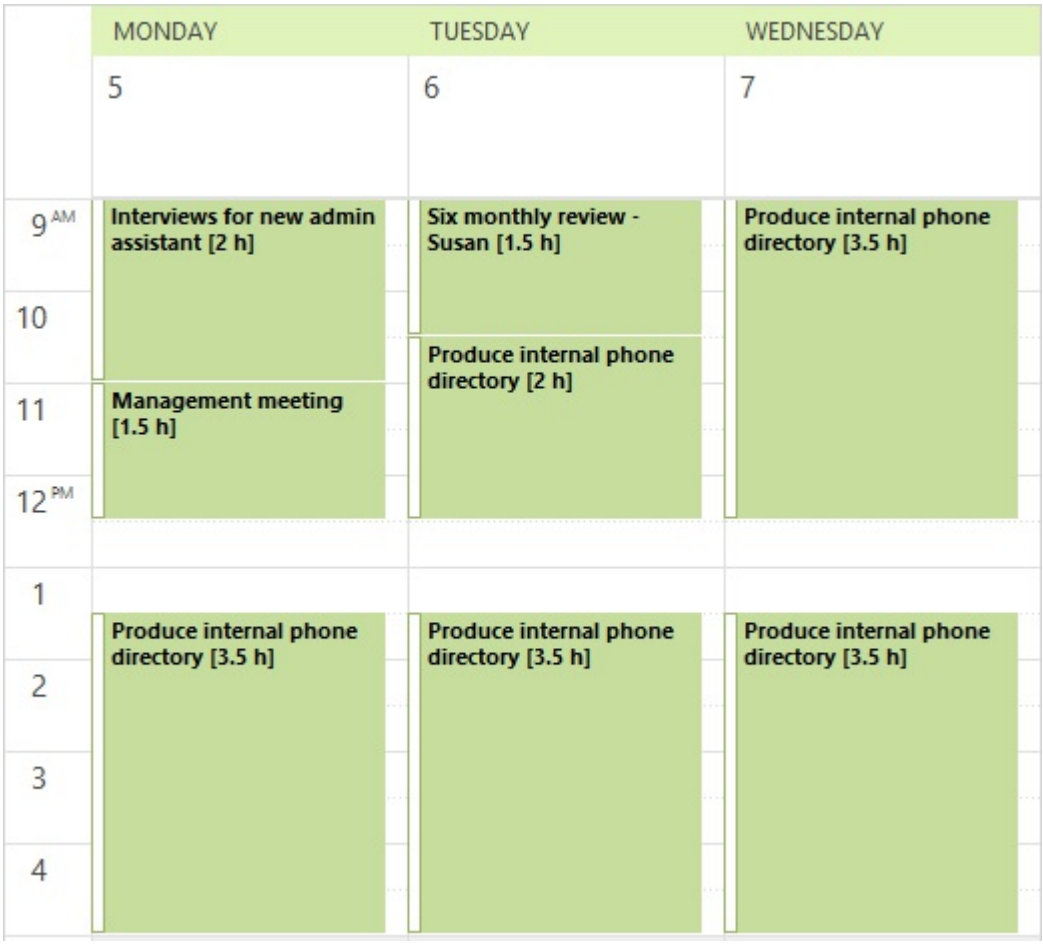
Creating Calendar Task Entries

Taskline can integrate your task list with your Outlook calendar, in a time-scaled format. Everything you have to do, and when you should do it, is shown in one place, rather than having some of your work in the task list, and some in the calendar. You can also print out this calendar in daily, weekly or monthly formats.

To have Taskline display task entries for tasks (or parts of tasks) that are still outstanding on Outlook's calendar, click the **Calendar** tab on Taskline's main dialog and check the **Create for tasks that are Not Started or In Progress** check box. For example, you might make the following entries in the task list:

SUBJECT	TOTAL WORK	SCHEDULED START	SCHEDULED END
Click here to add a new Task			
Interviews for new admin assistant	2 hours	Mon 5/5/2014 9:00 AM	Mon 5/5/2014 11:00 AM
Management meeting	1.5 hours	Mon 5/5/2014 11:00 AM	Mon 5/5/2014 12:30 PM
Six monthly review - Susan	1.5 hours	Tue 5/6/2014 9:00 AM	Tue 5/6/2014 10:30 AM
Produce internal phone directory	22.5 hours	Mon 5/5/2014 1:30 PM	Thu 5/8/2014 4:30 PM
Review invoicing procedures	5 hours	Thu 5/8/2014 4:30 PM	Fri 5/9/2014 2:30 PM

When the **Show as** option on the Taskline dialog **Calendar** tab is set to **Appointments, with accurate start and end times**, your tasks result in the following task entries in Outlook's calendar:



Notice how a single task can result in several task entries. This is because few tasks are worked on non-stop. You may do some of a task in the morning, stop for lunch, do some more in the afternoon, stop at the end of the day and then finish it off the following day. Task entries show all this information, whereas tasks only summarize it by showing only dates for the **Scheduled start** and the **Scheduled end.**

When the **Show as** option is set to **All day events from task Scheduled start to Scheduled end**, the tasks are shown as below. This is the same schedule, just represented differently:

Other guidelines for task entries are as follows:

- You can color task entries differently from regular appointments. How?
- You can use the **Show time as** list on the **Calendar** tab of Taskline's main dialog box to have Calendar task entries created as **Busy**, **Free**, **Tentative**, **Out of Office** or (for Outlook 2013 and later) **Working Elsewhere**. You can use this feature to help distinguish Calendar task entries from regular appointments in any version of Outlook.
- Further to the previous point, you can override **Show time as** on a per-task basis, by setting **Show as** on the **Taskline** tab of the task form in Outlook. This could be used to differentiate certain task in the calendar.
- If you want milestone tasks, which have 0 **Total work**, to be displayed in the Calendar too, select the **Create all day events for milestones** check box on the **Calendar** tab of the Taskline dialog.

  Tip

  - When you create a task with 0 **Total work**, this is ignored by Taskline by default. To have Taskline schedule the milestone, uncheck the **Ignore this task** check box on the **Taskline** tab of the Taskline form in Outlook.

  More about goals and milestones.
- **High Priority** tasks result in Calendar task entries of **High Importance**, while **Low Priority** tasks give **Low Importance** ones.
- You can also maintain task entries for completed and partly completed tasks, to keep a record of what you have achieved in your calendar. How?
- If you make a change to one or more of your tasks, you will need to run Taskline again, for example by clicking the Reschedule button, to synchronize the calendar. More.
- Usually, uncompleted calendar task entries are deleted and recreated each time Taskline runs. So, if you change a calendar task entry in Outlook, for example to change the Category, this change will usually be lost when Taskline is next run. If you need to make a change, change the task instead and then re-run Taskline. However, you can **Pin** selected calendar task entries so that they survive a Taskline reschedule – see below.
- You can **Pin** individual calendar task entries so that they survive a Taskline

reschedule. This is so that you can use Taskline to automatically schedule your tasks and then tweak those results manually. Pinned entries do not get deleted and recreated during a Taskline reschedule, rather they stay put. Moving a calendar task entry will automatically pin it. More.

- If you have the **Keep a record of completed work** option selected, completed calendar task entries are left untouched by Taskline. However, if this option is not selected, Taskline will delete completed task entries when it runs.
- You may not wish to have your calendar filled up with tasks for many days or weeks ahead. Sometimes, it helps to just focus on short term goals. You can achieve this by setting the **Limit tasks in calendar to first ... days** option, which is on the **Calendar** tab of Taskline's main dialog.
- By default, calendar task entries do not have a category. However, you can instruct Taskline to copy any categories assigned to a task to its calendar task entries. Or, Taskline can assign the same category or categories to all calendar task entries. These settings are in the **Advanced Options** dialog. More

Related Topics

Giving Calendar Task Entries Colors

Accessing a Task via its Task Entry

Keeping Task Entries Private

Displaying Times for All Appointments on the Calendar

About Appointments

Calendar Views

Defining the Subject of Task Entries

Manually Overriding Some or all of Taskline's Scheduling

Giving Calendar Task Entries Colors

Taskline optionally creates calendar task entries, which are appointments in Outlook's calendar that represent tasks. How? You can tell Taskline to give calendar task entries certain colors, for example to distinguish them from ordinary appointments, or highlight important items.

Note

- Taskline uses a feature of Outlook 2003 and earlier called **Labels** to color calendar task entries. Outlook 2007 and later work correctly with **labels**, but label commands are no longer shown in Outlook's menus and dialogs. Instead, Outlook 2007 and later prefer to use **Categories** to color appointments. In Outlook 2007 and later, if appointments or calendar task entries are assigned a **category**, then the **category** color is shown, rather than the **label** color. Thus if you want to color calendar task entries using **labels**, you must select Taskline's **Always set to** Advanced option and leave the edit box blank. More. In Outlook 2007 and later, **label** colors are only shown if appointments and calendar task entries do not have any **categories** assigned.

Taskline allows calendar task entries to be colored differently according to task attributes, such as **Category** or **Project**. Select the **Calendar** tab of Taskline's main dialog and click the **Define Colors** button. The resultant **Calendar Task Entry Colors** dialog allows you to setup rules that control whether calendar task entries are created and, if so, how they are colored. The table on this dialog lists the existing rules. You can color and control the creation of calendar task entries based on:

High/Medium/Low Priority	This refers to the High/Medium/Low priority that can be assigned to Outlook tasks, for example by using the **Priority** drop down list on the Tasks tab of the task form. Each **priority** can be assigned a different color.
Priority letter	You can color tasks based on the letter of their **Priority (A1)** value; the **Priority (A1)** number is ignored. The **Category Etc** drop down list will only show those **Priority (A1)** letters that are currently assigned to tasks.
Milestones	You can color milestones differently to highlight them on the calendar. You will need to place the **Milestones** rule before any **Not Started Tasks** or **Completed Tasks** rules, as milestones are also tasks.
Completed or **Not Started**	You can color completed work differently to outstanding work.
Category	Tasks can be assigned a **category** in Outlook, for example by clicking on the **Categories** button on the Tasks tab of the task form. You can then instruct Taskline to color calendar task entries differently, depending on the **category** that has been assigned to the task. Note that the **Category Etc** drop down list will only display task **categories** that are currently assigned to tasks. If no task **categories** have been assigned, no **categories** will be displayed in the drop down list.
Project	Tasks can be assigned a **Project** using the **Taskline** tab of the task form in Outlook. How? The **Categories Etc** drop down list will display all current project names. You cannot add new project names from the **Calendar Task Entry Colors** dialog. Use the **Projects** tab to do this. More about projects.
Working hours	**Working hours** are defined using the **Working Hours** tab of the

	Taskline dialog How? and assigned to tasks using the Taskline task form in Outlook. How?
Overdue	Overdue tasks are defined as those with a missed **Task should** constraint or tasks where the **Due** date is in the past.
Pinned	Use this setting to color **Pinned** calendar task entries differently.

Note

- To prevent the creation of calendar task entries for one or more **Category Etc** values, select from the color drop down list.

Tip

- If a task satisfies multiple rules, it will be assigned a color according to the earliest rule in the list. You can use the **Move Up** and **Move Down** buttons to change a rule's position in the list.

To Do This	Do This
Add a new rule	Select a task **Category Etc** and a Color using the drop down lists, then click the **Insert New** button. You cannot create more than one rule for the same **Category Etc**.
Update an existing rule	You can update an existing rule by clicking on it to select it, and then changing the **Category Etc** or the color using the drop down lists below the table. To commit your change, click a blank area of the table, or click a different rule in the table, or click the **Update** button.
Delete a rule	Select a rule and click **Delete** to remove it.

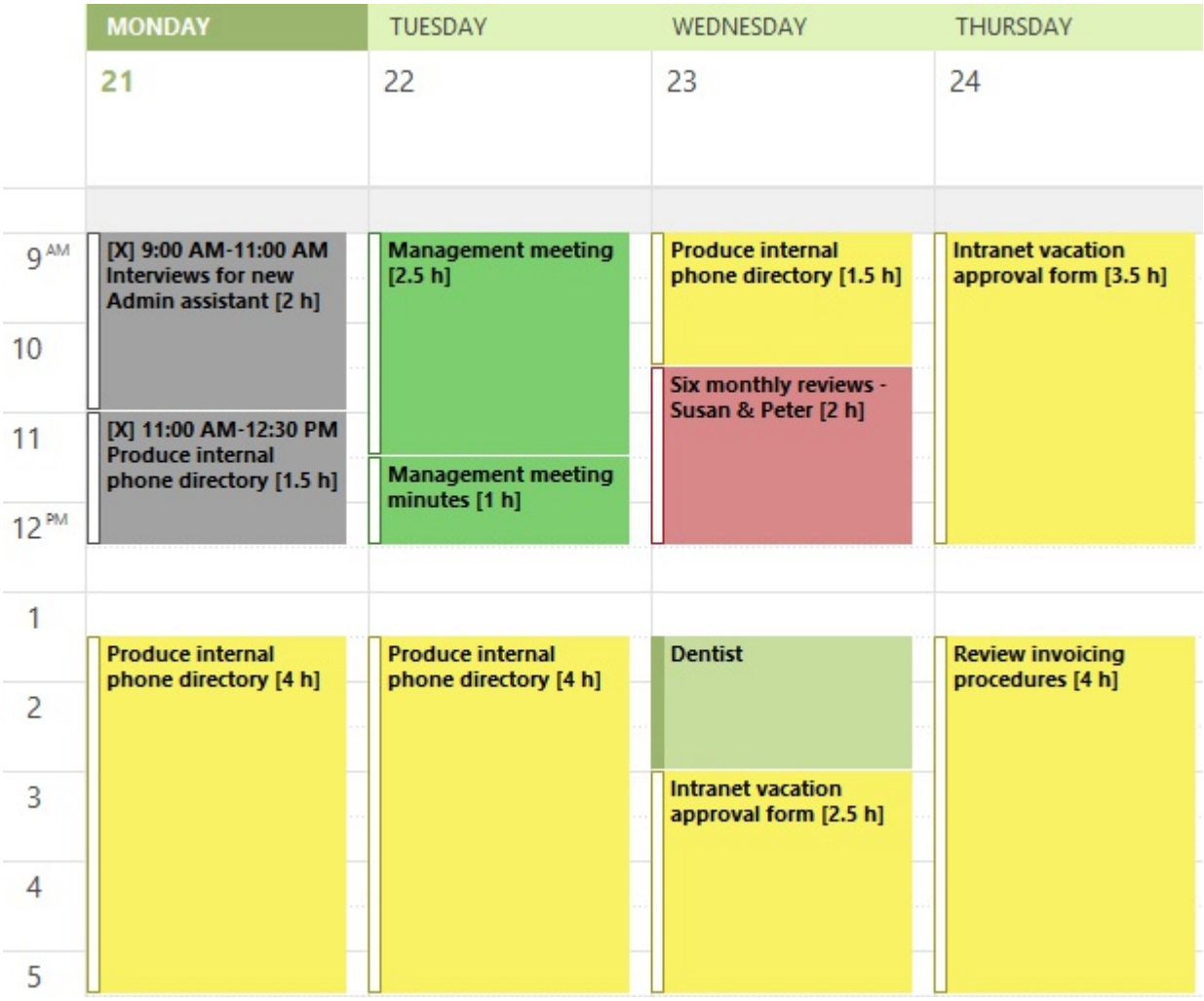
In the following example, task "Interviews for new admin assistant" has been completed, and task "Produce internal phone directory" is currently in progress. All the other tasks are not yet started. Additionally, tasks have been assigned a **Category**:

!	SUBJECT	TOTAL W...	SCHEDULED START	SCHEDULED END
	Click here to add a new Task			
☑	~~Interviews for new Admin assistant~~	~~2 hours~~	~~Mon 10/21/2013 9:00 AM~~	~~Mon 10/21/2013 11:00 AM~~
☐	Produce internal phone directory	11 hours	Mon 10/21/2013 1:30 PM	Wed 10/23/2013 10:30 AM
☐	Management meeting	2.5 hours	Tue 10/22/2013 9:00 AM	Tue 10/22/2013 2:30 PM
☐	Management meeting minutes	1 hour	Tue 10/22/2013 2:30 PM	Tue 10/22/2013 3:30 PM
☐	Six monthly reviews - Susan & Peter	2 hours	Wed 10/23/2013 10:30 AM	Wed 10/23/2013 12:30 PM
☐	Intranet vacation approval form	6 hours	Wed 10/23/2013 3:00 PM	Thu 10/24/2013 12:30 PM
☐	Review invoicing procedures	5 hours	Thu 10/24/2013 1:30 PM	Fri 10/25/2013 10:00 AM

The **Calendar Task Entry Colors** dialog is then used to assign a color to each calendar task entry, based on **Category**. Additionally, completed **calendar task entries** will always be shown gray (because this rule is first in the list):

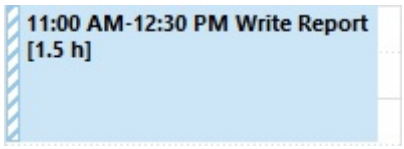
Category Etc	Label
<Completed Tasks>	
[Cat] Office	
[Cat] Meeting	
[Cat] Personnel	

The resultant calendar view looks like this:



Displaying Times for Task Entries on the Calendar

Calendar task entry without times



Calendar task entry showing start and end times by using the <StartEndTime> token

Outlook does not display times on the calendar's Week view. If you want your calendar task entries to display times:

- Use the **<StartEndTime>** token to display start and end times. To do this:
  1. Click the **Calendar** tab on the Taskline dialog.
  2. Click the **Define Subject** button.
  3. Enter the token in the **Subject for outstanding entry** box on the **Calendar Task Entry Subject** dialog. More
- Select the **Enable times tokens** option, which is also on the **Calendar Task Entry Subject** dialog.

Accessing a Task via its Task Entry

Taskline adds an **Open Task** button to a calendar task entry, so that you can quickly open the task it represents. In Outlook 2007, this button is on the Appointment toolbar, on Outlook 2010 and 2013 it's on the **Taskline** section of the Appointment ribbon:

1. Open the calendar task entry to display the **Calendar Task Entry** toolbar or ribbon.
2. Click the **Open Task** toolbar or ribbon button to open the task associated with the open calendar task entry.

Tips

- You can also open the task by right clicking a calendar task entry in Outlook's calendar and selecting **Open Task** from the popup menu. This is usually quicker as there's no need to open the item first.
- You can also open several tasks at once by selecting several calendal task entries and right clicking any one of them.

Keeping Task Entries Private

If you work in a group and your calendar folder is visible to other people, for example you use Microsoft Exchange Server to share your calendar folder, then you may wish to keep some or all of your task entries private:

- To have Taskline create all task entries as private, select the **Mark all as private** checkbox, which is on the Calendar tab of Taskline's main dialog box.
- If the **Mark all as private** option is not selected, then Taskline will create private calendar task entries only for those entries that represent private tasks.

Related Topics

Giving Calendar Task Entries Colors

Showing Your Tasks in Outlook's Calendar

About Appointments

Calendar Views

Tokens

Defining the Subject of Task Entries

You can control what subject Taskline gives task entries created in the calendar. By default, a task called "Tidy office" that starts at 9am and ends at 10:30am will have its task entry called "9:00 AM-12:00 PM Tidy office [1.5 hrs]".

Click the **Define Subject** button on the **Calendar** tab of the **Taskline** dialog box to display the **Calendar Task Entry Subject** dialog box. This allows you to change the templates that are used to define the **Subject** of a calendar task entry. The templates usually contain tokens, which are the items starting with **<** and ending with **>**. These are replaced by actual values from the task or task entry to create the task entry subject.

There are four templates shown in four boxes. The first template is used to define the subject of task entries for work that is still outstanding. The second template is used to task entries that represent completed work. The third is used for milestones that are yet to be achieved and the last is used for completed milestones. More about milestones.

For example, if you type "**<TaskSubject>**" as the template, then each task entry will be given the same subject of the task it represents. **<TaskSubject>** is an example of a **token** – which is some text that gets replaced by whatever it represents. There are many different tokens available. For example, **<TaskTotalWork>** represents the task's duration.

Any characters in the template that are not part of a token get copied to the task entry subject unchanged. For example, if you entered "Task duration is **<TaskTotalWork>**" as your template, then for the example above, the task entry would be given the Subject "Task duration is 1.5 hrs."

A link to the complete list of available tokens is shown below. Some represent task details, others represent task entry details. On the **Calendar Task Entry Subject** dialog, you can see whether the template you type in is correct, because the dialog shows you the results of processing your template for an imaginary task and milestone.

Note

- The **Enable times tokens** option allows you to quickly remove times from the subjects of calendar task entries. This can be useful when switching between Outlook views, because some Outlook calendar views benefit from times, while others don't. Specifically, if this option is deselected, then the following tokens act as empty strings: **<StartEndTime>**, **<StartTime>** and **<EndTime>**. All other tokens are unaffected.

Related Topics

Tokens Reference

Showing Your Tasks in the Outlook Calendar

Milestones

Tokens That Refer To Calendar Task Entries

Token Name	Description
<EndDate>	The date the **task entry** ends on.
<EndTime>	The time the **task entry** ends on.
<StartEndTime>	This token converts to nothing (an empty string) if **task entry alignment** is off, otherwise it is equivalent to "**<StartTime>** - **<EndTime>** ", for example "9:00 – 10:30 ". Note the space at the end of the token.
<StartDate>	The date the **task entry** starts on.
<StartTime>	The time the **task entry** starts on.
<Work>	The duration of the **task entry**.

Tokens That Refer To Tasks

Token Name	Description
<Task%Complete>	How complete the task is. This value is not necessarily the same as the **% Complete** value entered on the task form, as **Actual Work** is taken into account as well More information. This token is blank if the task is not started.
<Task%Rem>	How much work remains to be done on the task, expressed as a percentage.
<TaskA1>	The task's **Priority (A1)** value.
<TaskActualStart>	The task's **Actual start** date.
<TaskAttach>	Shows [A] if the task has attachments.
<TaskCategories>	The task's **Categories**.
<TaskCompanies>	The task's **Companies** text, taken form the **Details** tab of the task form.
<TaskContacts>	The list of **Contacts** that have been assigned to the task.
<TaskEndDate>	The task's **Scheduled end** date.
<TaskEndTime>	The task's **Scheduled end** time.
<TaskHours>	A task's **Working hours**.
<TaskNotes>	Shows [N] if the task has notes.
<TaskProject>	The **Project** setting for a task.
<TaskRole>	The task's **Role** text. This is a standard task property that is not shown on the task form. You must add a column to the task view in Outlook to set it.
<TaskStartDate>	The task's **Scheduled start** date.
<TaskStartTime>	The task's **Scheduled start** time.
<TaskSubject>	The task's **Subject**.
<TaskTotalWork>	The task's **Total work**.
<TaskWorkDone>	How much has already been done on the task, expressed as a duration.
<TaskWorkRem>	How much work remains to be done on the task, expressed as

	a duration.

Related Topics

Defining the Subject of Task Entries

Getting the Most out of Outlook Views

This section summarizes aspects of Outlook's view handling that are most useful to Taskline users. You should consult Outlook's own documentation for full information on how to work with Outlook's views – only brief details are included here.

Customizing the Task Table View

This section describes how to get Outlook's task table looking just how you want. Once you have done that, you may well want to name and save your settings, so that you can switch to a different view, and then switch back to your own custom view settings very easily.

Before you start to customize a view, it is safer to create a new view first, and customize that. How?

Creating New Views and Copying Existing Views

Rather than alter one of Outlook's predefined views, it is safer to first create a new view to contain your custom view settings. You must do this before you start customizing the view, if you don't want to modify the current view as well.

It is often quicker to create a copy of an existing view, and modify that, rather than create a new view from scratch, so this is the technique that will be described here.

Outlook 2007

1. Click **View** menu → **Current View** → **Define Views** to open the **Custom View Organizer** dialog.
2. Select the existing view you wish to copy, for example **<Current view settings>**.
3. Click the **Copy** button.
4. Enter a name for your new view.
5. Choose the appropriate **Can be used on** setting.
6. Click OK. The **Customize View** dialog will appear; assuming you don't want to change anything, just click OK.
7. You should now be back on the **Define Views** dialog. Click the **Apply View** button to make the new view the current view.

You are now ready to start customizing this view.

Outlook 2010 and 2013

1. Click the **View** ribbon (or **VIEW** in Outlook 2013) → **Change View** → **Save Current View As a New View**. The **Copy View** dialog will appear.
2. Enter a name for your new view.
3. Choose the appropriate **Can be used on** setting.
4. Click OK. Then follow the instructions for switching named views below.

Switching Named Views

To switch to a different view:

- Outlook 2007 – Click **View** menu → **Current View**. Then choose your view from the list presented in the menu. Alternatively, select a view from the **Current View**

drop down list on the **Advanced** Outlook toolbar.

- Outlook 2010 and 2013 – Click **View** (Outlook 2013: **VIEW**) ribbon → **Change View**

Resetting Standard Outlook Views

If you inadvertently change one of Outlook's predefined views, you can revert to its original settings:

- Outlook 2007 – Open the **Define Views** dialog (How?), select the view you want reverting and press the **Reset** button.
- Outlook 2010 and 2013 – Click **View** (Outlook 2013: **VIEW**) ribbon → **Reset View**

Adding New Columns

You will probably want to add extra columns to the task view to show some useful Taskline task information, such as **Scheduled start** and **Priority (A1)**. You may want to create a new view before adding new columns How?.

To add new columns, right-click any column heading and select **Field Chooser** from the pop up menu. You can now drag fields off the **Field Chooser** dialog and onto the table view column headers. The table view will then display that field for each task.

To get the **Field Chooser** to display fields that are special to Taskline tasks, click the drop down list at the top of the **Field Chooser** dialog and select the **User-defined fields in folder** option.

Once the **User-defined fields in folder** option is selected, you will see all of the special fields that Taskline defines for Taskline tasks. You can drag these off the **Field Chooser** and onto the table column headers, to have the table view display Taskline fields.

Note

- Any field beginning with an "@" symbol is for Taskline's internal use only; if you alter these fields you will probably stop Taskline from working correctly.
- Because of a restriction in the way Outlook works, Taskline special fields that represent a duration, such as **Work remaining**, are always displayed as a number of minutes in the task table view.

Related Topics

Fields Specific to Taskline Tasks

Changing the Way Columns and Column Values are Displayed

Removing Unwanted Columns

Sorting

Grouping

Predefined Outlook Views

Fields Specific to Taskline Tasks

Field Name	Description
A1	This field represents how important each task is, so that Taskline can schedule the more important tasks first. This field is equivalent to the **Priority (A1)** value on the Taskline form. **A1** contains a letter and an optional number. This field represents the same priority field used by FranklinCovey® PlanPlus. More.
ABC	**ABC** contains just the letter of **Priority (A1)**, if set. This allows you to group Outlook views by this letter.
Actual start	This is the date the task actually started. It is only set for a task that is **in progress** or **completed**. See Progress Fields on a Taskline Task for more information.
Constraint	This is the external constraint on the task. It can either be blank, or set to one of **Start on**, **Start on or After**, **Finish on** or **Finish on or Before**. More.
Constraint date	This is the date and time corresponding to any constraint. If no constraint time is set, a time of 0:00 is shown. More.
Hours remaining	This is same as the value for **Work remaining,** but is always represented as a number of hours.
Ignore task	If this box is checked, Taskline completely ignores the task.
Max time per day	This is used to limit how much time is allocated each day to a longer task. More.
Max time per week	This is used to limit how much time is allocated each week to a longer task. More.
Min split	This is the smallest duration that a task can be split into. More
Missed constraint	This field is normally zero. However, when a **task constraint** can't be met, Taskline sets **Missed constraint** to the elapsed gap between the scheduled date and the **Constraint date**.
Project	This denotes the name of the project that the task belongs to, if any. More.
Remind	Whether a Taskline **Reminder** has been set. More about reminders.
Remind Minutes	If a Taskline **Reminder** has been set, this field represents how many working minutes before the **Scheduled start** the **Reminder** should go off. More about reminders.
Scheduled end	The date and time the task is scheduled (or planned) to end. More.
Scheduled start	The date and time the task is scheduled (or planned) to start. More.
Show as	The **Show as** value to be assigned to this task's **calendar task entries**.
Split	A way of showing if the task can be split into several shorter parts during scheduling. The value is true if the task can be split and false otherwise. More.
Task priority	A way of saying how important each task is, so that Taskline can schedule the more important ones first. This field supports tasks created with Taskline Version 2.0 and older. This field is not recommended for use with tasks created with Taskline Version 2.1 and newer.
Week commencing	The date of the start of the week that the task starts on. This field is useful for grouping tasks on an Outlook table view. More about grouping.
Work	You cannot set **Work remaining** as Taskline calculates this value. **Work**

remaining	**remaining** shows the amount of work that is still outstanding on the task. More.
Working hours	The **Working hours** assigned to the task. More.

Related Topics

The Taskline Task Form

Changing the Way Columns and Column Values are Displayed

By default, columns in Outlook's tasble views get the name of the field they represent. This is usually fine, but sometimes you may wish to change it. For example, you may wish to change the name of the **Scheduled end** column to **Sched End**, to make the column narrower.

To rename a column:

- Outlook 2007 – Right-click the column heading and select **Format Columns** from the menu.
- Outlook 2010 and 2013 – Right-click the column heading and select **View Settings** from the menu. Then click the **Format Columns** button.

The **Format Columns** dialog box will appear. You can change the column name by changing the **Label** text on the dialog box. Other controls on this dialog box allow you to change how the column values are displayed, for example left, centre or right aligned.

Note

- Because of a restriction in the way Outlook works, Taskline special fields that represent a duration, such as **Work remaining**, are always displayed as a number of minutes in the task table view.

Removing Unwanted Columns

Simply drag an unwanted column off the column heading row.

Sorting

You can sort on a column simply by clicking the column header. For example, to sort your task list into **Scheduled start** order, click the **Scheduled Start** column heading. Click a second time to sort into reverse order.

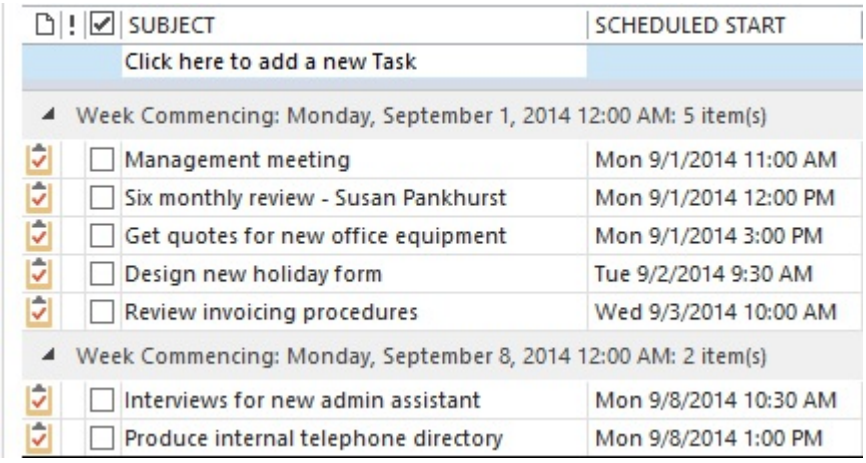
To sort on a field that is not displayed, or to sort on more than one field, or to switch off sorting, you will need to use the **Sort** dialog box. To access this, do the following:

- Outlook 2007 – Click the **View** → **Current View** → **Customize Current View** menu option, then press the **Sort** button on the **View Summary** dialog box.
- Outlook 2010 and 2013 – Right-click the column heading and select **View Settings** from the menu. Then click the **Sort** button.

If you wish to sort on any Taskline special fields, you will need to select **User-defined fields in folder** from the **Select available fields from** drop down list on the dialog box.

Grouping

A group is a set of items with something in common, such as the same priority. You can group common items together under one heading, which can be expanded by clicking on the **+** or ▷ buttons to show all of the contained items, or contracted, by clicking on the **-** or ◢ buttons, to conceal them. For example, Taskline tasks contain a **Week commencing** field – this can be a convenient way of grouping tasks:


SUBJECT
SCHEDULED START
Click here to add a new Task
Week Commencing: Monday, September 1, 2014 12:00 AM: 5 item(s)
Management meeting
Mon 9/1/2014 11:00 AM
Six monthly review - Susan Pankhurst
Mon 9/1/2014 12:00 PM
Get quotes for new office equipment
Mon 9/1/2014 3:00 PM
Design new holiday form
Tue 9/2/2014 9:30 AM
Review invoicing procedures
Wed 9/3/2014 10:00 AM
Week Commencing: Monday, September 8, 2014 12:00 AM: 2 item(s)
Interviews for new admin assistant
Mon 9/8/2014 10:30 AM
Produce internal telephone directory
Mon 9/8/2014 1:00 PM

To choose what field to group by, right click on a column heading and select **Group By This Field** from the pop-up menu. For more control, for example to group by more than one field, do the following:

- Outlook 2007 – Select the **View** → **Current View** → **Customize Current View** menu option, then press the **Group By** button on the **View Summary** dialog box.
- Outlook 2010 and 2013 – Right-click the column heading and select **View Settings** from the menu. Then click the **Group By** button on the **Advanced View Settings** dialog.

If you wish to sort on any Taskline special fields, you will need to select **User-defined fields in folder** from the **Select available fields from** drop down list on the dialog box.

Related Topics

Customizing the Task Table View

Creating New Views and Copying Existing Views

Switching Named Views

Resetting Standard Outlook Views

Adding New Columns

Using Grouping Instead of Sub-Folders

Predefined Outlook Views

Predefined Outlook Views

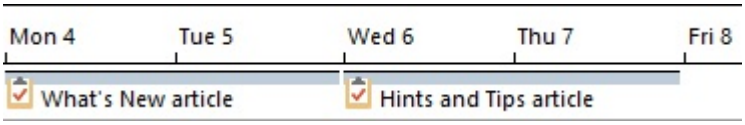
This section summarizes some of the predefined Outlook views that may be useful to Taskline users.

Note that the **Task Timeline**, **Next Seven Days** and **Overdue Tasks** views all use the task **Due Date**, with the **Task Timeline** view using **Start Date** as well. Therefore, for these views to work correctly, you must either:

1. Have the **Taskline should set Start and Due to the Scheduled dates** Taskline option enabled How?
2. Or change the view properties so that these views use **Scheduled start** and **Scheduled end** instead. Do one of the following:
    - Outlook 2007
        - Select the **View** → **Current View** → **Customize Current View** menu option.
        - On the **View Summary** dialog, click the **Fields** button. This takes you to the **Date/Time Fields** dialog, which allows you to change the fields these views use to ascertain the start and ends of tasks
    - Outlook 2010 and 2013
        - Click **View** ribbon (or **VIEW** in Outlook 2013) → **View Settings**
        - On the **Advanced View Settings** dialog, click the **Columns** button. This takes you to the **Date/Time Fields** dialog, which allows you to change the fields these views use to ascertain the start and ends of tasks

Task TimeLine View

The **Task Timeline** view shows a time scaled bar chart:



To use this view:

- Outlook 2007 – select the **View** → **Current View** → **Task Timeline** menu option.
- Outlook 2010 and 2013. These version of Outlook do not come with a predefine **Task Timeline** view so you will need to create one:
    - Click **View** ribbon (or **VIEW** in Outlook 2013) → **Change View** → **Manage Views**
    - Click the **New** button to display the **Create a New View** dialog.
    - Give the view a name and select the **Timeline** option in the **Type of view** list.
    - OK all the open dialogs.

Next Seven Days

This view displays only those tasks that are due in the next 7 days. But be careful – this view excludes overdue tasks!

Overdue Tasks

This view displays only those tasks that are not yet complete but with a **Due Date** that has passed.

Related Topics

Customizing the Task Table View

Printing Your Task Schedule

Having a printed Taskline schedule on your desk really helps to give you focus by reminding you what needs to be done and by when. Printing out a calendar containing Taskline's calendar task entries is particularly helpful, because you can easily see what you should be currently working on. To print your calendar schedule, open your calendar folder and then:

1. For Outlook 2007, click **File** menu → **Print** to display the **Print** dialog.
2. For Outlook 2010 and 2013, click **File** (or **FILE** in Outlook 2013) ribbon → **Print** to display the **Print** screen.
3. In the **Settings** (or **Print style** in Outlook 2007) list on the **Print** screen or dialog, click the style you wish to print. **Monthly Style** is particularly useful for printouts, and corresponds to the **Monthly** calendar view.
4. If you are using Outlook 2010 or 2013, click the **Print Options** button to display the **Print** dialog. Outlook 2007 users can omit this step.
5. Choose a date range by using the **Print Range** settings on the **Print** dialog to say when you want the printout to start and end.
6. Set the font for printing. Click the **Page Setup** button on the **Print** dialog. Here you can change the print font without changing the on-screen font. Arial Narrow is particularly useful for printing.
7. On the same dialog, for the **Monthly Style** only, it is often useful to clear the **Print Exactly One Month Per Page** check box, if you are printing out a schedule mid-month.
8. Click **OK** on the **Page Setup** dialog to save your changes and then click **OK** on the **Print** dialog to print your schedule.
9. You may also wish to filter your calendar before printing. For example, you may have routine reminders in your calendar that you don't want to appear on your printout. You could filter on for example **category** or **Show time as** to remove certain types of appointments from your printout. Please consult Outlook's documentation for instructions on filtering views.

Progress: Working Through Your Task List

As you work through your task list, you will want to mark up your progress for the following reasons:

1. You know what has been done and what is still to do.
2. Taskline carries forward uncompleted work, scheduling it for a future date. If Taskline isn't told when task work has been completed, this work will get carried forward too, and hence the resultant schedule will not be correct.

Marking up progress also optionally allows you to keep an accurate record of what work you have completed, and when it was done.

When scheduling tasks, Taskline places tasks (or parts of tasks) that still have outstanding work after the **First task starts at** date. Completed tasks, or completed parts of tasks, are never scheduled by Taskline. These are left alone as they form a historical record of past work. On completed tasks you have the opportunity to record information about how the task went, such as how much time you actually spent on it – **Actual Work** – and when you actually started it – **Actual start**.

Tasks can be at any stage of progress, from **Not Started**, to **Completed**, or any part completed stage in between. Taskline can also show tasks in the calendar. These appointments, used to represent tasks, are called "calendar task entries" and they can also record progress. Unlike tasks however, calendar task entries cannot be part-completed, but rather only **Not Started** or **Completed**. You can mark up progress on both tasks and calendar task entries. Adding progress to a task will automatically add the same amount of progress to its calendar task entries, and vice versa.

Sometimes it's sufficient to mark tasks as complete and then just forget about them. However, if you wish to keep a record of exactly what you did, and when, you should select the **Keep a record of completed work** option, which is on the **Calendar** tab of Taskline's main dialog. If this option is selected, completed calendar task entries are left alone by Taskline. If things didn't go exactly according to schedule, and you want to maintain an accurate historical record of your work, you edit the completed calendar task entries in Outlook, just like you would any other appointment, to reflect what actually happened.

Keeping a work record can be very useful, both as a time record for yourself and others, and also as a bank of historical information which can be used to help produce more accurate time estimates for future work.

If you are not interested in past work, deselect the **Keep a record of completed work** option. This will instruct Taskline to delete completed calendar task entries when it runs (completed tasks are not deleted).

Related Topics

Progress Fields on a Taskline Task

The Effect on Calendar Task Entries of Adding Task Progress

Recording Task Progress via Outlook's Calendar

Keeping Task Work Estimates Up-to-Date

Organizing Completed Tasks

Progress Fields on a Taskline Task

On the **Taskline** tab of the task form in Outlook, there are several fields that specifically relate to task progress. You record your progress by updating one or more of these fields:

Actual start	This field records exactly when you started work on a task. Before you add any progress, you have the opportunity to set this field, although doing so is optional. If you don't set it, Taskline will set it for you: ▪ If calendar task entries exist for the task, then the task **Actual start** is taken from the **Start** of the first calendar task entry. ▪ Otherwise, it's assumed that the task started on schedule and **Actual start** is set to equal to the **Scheduled start**. Other **Actual start** guidelines are: ▪ For a task that is part completed, **Actual start** will show when the task started, **Scheduled start** will show when the remaining part of the task should be started, and **Scheduled end** will show when the task is due to be fully completed. ▪ For a completed task, **Scheduled start** will show when the task started (i.e. it is set to be the same as **Actual start**) and **Scheduled end** will show when it ended.
Actual work	This field gives you the opportunity to record the amount of work you have actually done on a task to date. Setting **Actual Work** to something greater than zero will update the **Status** to **In Progress**. Updating this field is optional, you can simply ignore it if you prefer. However, **Actual Work** is useful because it gives you the opportunity to record how much time you *actually* spent on a task, as opposed to the **Total Work** field, which is how much time you originally *thought* you would spend on it. It may be useful to look back at this information when scheduling similar work at a future date. Or, you or your manager may find the information useful now, so that you both know where all your precious time went!
% Complete	Similar to **Actual Work**, this records what percentage of the task has been completed to date. Updating this field is optional, you can simply ignore it if you prefer. Setting **% Complete** to zero will automatically set **Status** to **Not Started**, setting it to 100% will set **Status** to **Completed** and setting it to a value between 0 and 100 will automatically set **Status** to **In Progress**. ▪ Because of a restriction in the way Outlook works, **% Complete** is always rounded to the nearest whole number. For example, Taskline will see 10.5% as 11%, even though the task form shows 10.5%. ▪ For convenience, a **% Complete** setting of 33% is taken to be exactly one third, and a **% Complete** setting of 67% is taken to be exactly two thirds. For example, a 6 day task that is 33% complete will have exactly 4 days remaining.
Work remaining	This information is display only – you cannot edit it. As you enter progress, the **Work remaining** field updates to show you how much work remains to be done.
Status	This field has several values but the three that concern progress are **Not Started**, **In Progress** and **Completed**. Setting **Status** to **Not Started** will automatically set **% Complete** to zero and setting **Status** to **Completed** will set **% Complete** to 100. Setting the **Status** to **In Progress** does not, in itself, add progress to a task. It merely marks the task as having been started.

Tips

- You can add any of the above fields to an Outlook task table view, so that you don't need to open the form to see these items.
- You can set the **% Complete** and **Status** fields on either the **Task** tab, or the **Taskline** tab, of the task form.

For tasks, whether you set **% Complete** or **Actual Work** is up to you. If you think to yourself "I have done half of this task," then it is natural to set **% Complete** to 50%. If, on the other hand, you think to yourself "I have spent 3 hours on this task so far," then set the **Actual Work** to 3 hours. However:

- **Milestones** (or **goals**) cannot be progressed using **Actual Work**, as they have no work to progress. Use **% Complete** or **Status** to mark milestones as complete. More about goals and milestones.
- You cannot mark a task as **Complete** by setting **Actual Work** alone. You can only mark a task as complete by checking the **Complete** check box, or setting **Status** to **Completed**, or by setting **% Complete** to 100%.

You can set both **% Complete** and **Actual Work** if you wish. In this case, Taskline uses the field that gives the greatest amount of progress. For example, if a 10 hour task is marked as 20% complete and with 5 hours of **Actual Work**, Taskline will treat the task as being 50% complete, because 5 hours **Actual Work** out of 10 hours **Total work** is 50%.

A minimalist approach to tracking progress is to simply set **Status** to **Completed** as tasks are finished. This method doesn't track progress accurately, and doesn't give you an "actual versus predicted" task history, but nonetheless it is still a perfectly valid way of working.

Related Topics

Progress: Working Through Your Task List

The Effect on Calendar Task Entries of Adding Task Progress

Recording Task Progress via Outlook's Calendar

Keeping Task Work Estimates Up-to-Date

Organizing Completed Tasks

The Effect on Calendar Task Entries of Adding Task Progress

Adding or removing progress on a task will automatically set an equivalent amount of progress on that task's calendar task entries. Because a calendar task entry can only be **Not Started** or **Complete**, this may involve splitting calendar task entries. For example, if a 1 hour task with a single 1 hour calendar task entry is made 33% complete, this will result in one completed 20 minute calendar task entry and one **Not Started** 40 minute calendar task entry.

If you have set **Actual start** when task progress is first added, then the first calendar task entry will be moved so that it starts on the task's **Actual start**.

Related Topics

Creating task entries in the calendar

Progress: Working Through Your Task List

Progress Fields on a Taskline Task

Recording Task Progress via Outlook's Calendar

Keeping Task Work Estimates Up-to-Date

Organizing Completed Tasks

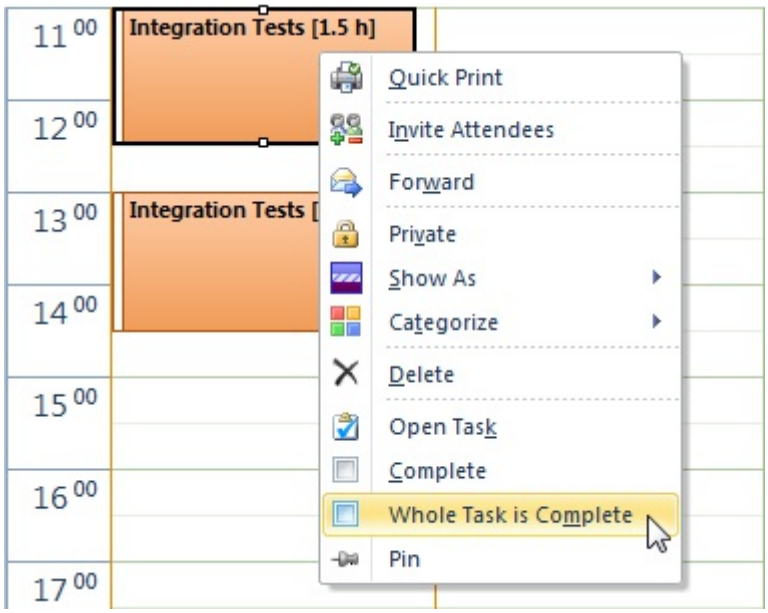
Recording Task Progress via Outlook's Calendar

There is just one progress field on a calendar task entry – **Complete**. To set this:

1. Open the calendar task entry to display the Outlook Appointment form.
2. Click the **Complete** button on the ribbon to mark the calendar task entry as completed and click **Save and Close** to commit your change.

Tips

- You can also use the context menu, which is often quicker. Right click the calendar task entry in Outlook's calendar and click **Complete** in the popup menu.
- You can also add or remove progress to or from several items at once by selecting several calender task entries and right clicking any one of them. The clicked menu option will then apply to all selected calendar task entries.
- When using the right click menu, there is also a **Whole Task is Complete** menu option. This is equivalent to clicking the **Open Task** button, then setting **Status** to **Completed** and clicking **Save and Close** on the task.



Note

- If a calendar task entry is only partially complete, and you wish to record this, then you will need to add progress via the task.

Adding or removing progress on a calendar task entry will automatically add or remove an equivalent amount of progress on the task:

- If a task has just one calendar task entry, then setting the calendar task entry as **Complete** will also mark the task as **Complete**. Similarly, clearing the **Complete** check box on a calendar task entry will mark the task as **Not Started**. In both cases, task **Actual Work** will be updated.
- If one task has several calendar task entries, then the task will be updated proportionately. For example, consider a 2 hour task which has two 1 hour calendar task entries:
    - Marking one of these calendar task entries as **Complete** will set the task to 50% Complete, **Status** to **In Progress** and **Actual Work** to 1 hour.

- Marking the second calendar task entry as also **Complete** will set the task to 100% Complete, **Status** to **Complete** and update **Actual Work** to 2 hours.

If a calendar task entry took more or less time than expected, first edit it in Outlook to reflect this, then mark it as **Complete**.

If you started work on a task at a different date and/or time to the one scheduled, and you want to record this, move the first calendar task entry to its correct time slot before marking it as **Complete**. This will set the task's **Actual start** accordingly.

For example, consider a 1 hour task with a single 1 hour calendar task entry. The task was scheduled to start at 10am and finish at 11am. However, you actually started at 9:30am, but finished as scheduled at 11am. In this case, change the calendar task entry's **Start Time** to 9:30am and then mark it as **Complete**. The task's **Actual start** will get set to 9:30am and the task's **Actual Work** will be set at 1.5 hours.

Related Topics

Creating task entries in the calendar

Progress: Working Through Your Task List

Progress Fields on a Taskline Task

The Effect on Calendar Task Entries of Adding Task Progress

Keeping Task Work Estimates Up-to-Date

Organizing Completed Tasks

Keeping Task Work Estimates Up-to-Date

As you enter progress, the **Work remaining** field on the **Taskline** tab of the task form updates to show you how much work remains to be done. You could also add the **Work remaining** field to an Outlook task table view, so that you don't need to open the form to see this information.

It may be that once you've started a task, you realize that your initial time estimate was not accurate. If this happens, you should update **Total work**, as well as **Actual Work** or **% Complete**. For example, if a task was initially estimated to take 8 hours, but after 4 hours work you realize that you have another 6 hours left to complete the task, mark the **Actual Work** as 4 hours (or the % Complete as 40%) and the **Total work** as 10 hours. The **Work remaining** will then update to show 6 hours.

A common and serious mistake when scheduling work is to not update future work estimates to reflect past experience. For example, consider a 4 day task that you find yourself only half way through after 3 days. If the first half of the task took you 3 days, then it is generally reasonable to assume that the second half will also take 3 days. Therefore, the **Total work** should usually be updated to 6 days in this case.

Related Topics

Progress: Working Through Your Task List

Progress Fields on a Taskline Task

The Effect on Calendar Task Entries of Adding Task Progress

Recording Task Progress via Outlook's Calendar

Organizing Completed Tasks

Organizing Completed Tasks

Generally speaking, completed tasks contain important information that you will want to keep track of for some time. However, completed tasks can clutter up your task list. They can be especially inconvenient if you view your list in **Scheduled start** order, since the completed tasks will appear at the top of the list.

One possible strategy for dealing with completed tasks would be sort your task view by **Complete** (**Ascending**) first, and then by **Scheduled start** (**Ascending**) second. How? This will show tasks in **Scheduled start** order, but with completed tasks moved to the bottom of the list. You could also group tasks on **Status**. How? This would group together all your **Not Started** tasks and show them first, then show your **In Progress** tasks, with the **Completed** tasks grouped together at the bottom of the list.

Another method would be to move completed tasks to a different folder, perhaps keeping one folder for current and future work, and another for past work. If you prefer this method of organizing tasks, you can have Taskline automatically move completed tasks for you. Check the **Move completed tasks to [folder name]** option on the Tasks tabs of the Taskline main dialog, and then click the **Select** button to choose the folder that is to contain the completed tasks. Taskline will then move any completed tasks to this folder each time it is run. Moving completed tasks to a different folder also has the advantage of making Taskline run quicker. Note that only tasks that are 100% complete can get moved. Thus if you entered progress using **Actual Work**, you should also set the **Status** to **Complete**, to tell Taskline that the task can be moved.

Tip

- The selected folder need not be in the same store as your main tasks folder. You could, for example, have your main task list in one .PST file, and have Taskline move completed tasks into another .PST file.

Related Topics

Working Through Your Task List

Keeping Task Work Estimates Up-to-Date

Advanced Scheduling Techniques

Task Constraints

Often it is not sufficient to simply have one task follow on after another. External constraints, such as deadlines, influence tasks. Taskline can take deadlines and other types of constraints into account when scheduling work.

Taskline features a rich set of constraints that can be used to override the normal sequencing of tasks. Constraints are set on the **Scheduling control** section of Taskline's task form. To set a constraint, you must first set the type of constraint using the **Task should** drop down list, and then you set the constraint date by typing the date in, or by using the **Date Picker** control. Setting a constraint time is optional; omitting it means that the constraint applies at any time during the specified day. This gives Taskline more scope to optimize the schedule.

Taskline supports 5 types of constraints:

- Select **Start on** to make the task start on the constraint date.
- Select **Start on or after** to make the task start on or after the constraint date.
- Select **Finish on** to make the task finish on the constraint date.
- Select **Finish on or before** to make the task finish on or before the constraint date. Both **Finish on** and **Finish on or before** constraints are useful for deadlines.
- Select **Work between** when you need to work on a task between 2 dates. For example, you have a deadline of 3 weeks tomorrow but you can't start work on the task until after a meeting next Monday.

To place a task rigidly, use a **Start On** constraint or a **Finish On** constraint with both a date and a time. Because such a task cannot be moved, they usually result in other tasks being split to work around the fixed task. Using these two constraints with just a date, and no time, gives Taskline some flexibility in scheduling and generally results in a less fragmented schedule.

Tips

- Task constraints will override the normal task ordering, but only if this is necessary for the constraint to be met.
- If the task reschedule is producing results that are difficult to understand, you can use the **Advanced Options** dialog to tell Taskline to temporarily ignore task constraints. How? This should simplify the process and help you understand how results are arrived at.
- Task constraints should be the exception, not the norm. Most of your tasks should be unconstrained and only those with deadlines or other external date issues should have constraints. If you place constraints on most of your tasks, then you are effectively manually scheduling and therefore stopping Taskline from working effectively.

Missed constraints

It is not guaranteed that constraints will be met – there are some circumstances when they might not be:

- Two or more tasks have conflicting constraints. For example, several tasks might have **Start on** or **Finish on** constraints for exactly the same day. If the sum of the **Total work** for those tasks exceeds the amount of working time available on that day, then it is probably going to be impossible to satisfy all of those constraints.

- The constraint is attempting to place the task before the **First task start at** date.

When a constraint can't be met, Taskline warns you in three ways:

- You get an alert when Taskline has finished updating your tasks. This lists any problems, although if there are a lot of them, only the first few task subjects are displayed.
- The **Missed constraint** task field, which is normally zero, is set to the elapsed gap between the scheduled date and the **constraint date**. This enables you to create an Outlook view highlighting tasks that need attention, optionally sorted into an order showing which tasks have missed their constraints by the greatest amounts.
- Taskline can also prefix the subject of a task that misses its constraint with some warning text. By default, this text is "!! ", but you can change it to anything you want. To do this, start Taskline and click the **Options** tab. Then change the **If a task constraint is missed, prefix task subject with** edit box to your preferred warning prefix. The text will automatically be removed once the constraint problem has been resolved.

Recurring Tasks

Recurring tasks have implied constraints which position such tasks on the date of their recurrence. By default, if a recurring task has an Outlook **Start** date, then this acts like a **Start on or after** constraint. But if a recurring task has a **Due** date and no **Start** date, then that task is scheduled as if it has a **Finish on** constraint. This default way of scheduling recurring tasks can be changed using the options in the **Recurring tasks** section of the **Advanced Options** dialog. More

A missed recurrence date will also result in Taskline issuing a missed constraint alert.

Regenerating Tasks

Milder warnings are issued for regenerating tasks that miss their recurrence date. These warnings will go away if the **Taskline should set Start and Due to the Scheduled dates** option is set. Furthermore, regenerating tasks that miss their dates will not mark the task as requiring attention. This is because regenerating tasks generally represent something that needs doing repeatedly, but not on specific dates.

Regenerating tasks are a specific type of recurring task.

Entering Constraints on Outlook's Task Table View

You can also enter task constraints in Outlook's table view, if you have added the **Constraint** and **Constraint date** columns to your view (see Adding New Columns for information on how to do this). Just type the name of the constraint, for example **Finish on**, in the constraint column for the appropriate task. To reduce typing, the constraint abbreviations "**SO**", "**SOOA**", "**FO**", "**FOOB**" and "**WB**" can also be used. These stand for **Start On**, **Start on or after**, **Finish On**, **Finish on or before** and **Work between** respectively.

To remove a constraint, select the blank **Task should** entry on the task form, or delete the constraint description on the **task table view**. You cannot add a constraint to a recurring task, since Taskline places recurring tasks on their **Start** or **Due** date, as appropriate.

Constraints Which Affect a Sequence of Several Tasks

By default, a constraint only affects the task with the constraint on. However, sometimes this is not what is required. For example, you may have a deadline to meet, which involves completing a sequence of several related tasks, not just one task. To do this for a **Finish On** or **Finish on or before** constraint, click on the **Select any other tasks**

also affected by this constraint check box and select the tasks from the list that you want to finish immediately before the current task. Similarly, for tasks with **Start On** or **Start on or after** constraints, select the tasks that you would like to start immediately after the current task. To **deselect** a task, simply click on it again.

The following types of tasks cannot be made dependent upon other tasks and hence will not be displayed in the **Select any other tasks also affected by this constraint** list:

- **Completed** tasks.
- **Recurring** tasks, because these are already constrained to happen on a certain day and you can't have two constraints on one task.
- **Delegated** tasks, because someone else is doing them.
- Tasks with their **Status** set to **Deferred** or **Waiting on someone else**, because these are effectively on hold and hence Taskline ignores them.
- Tasks with the **Ignore** check box checked. These are, by definition, ignored by Taskline.
- Tasks with **constraints**, again because you can't have two constraints on one task.

Using Different Working Hours for Different Tasks

This feature is supported in Taskline Professional Edition only.

Taskline Professional Edition allows you to define several different sets of Working hours. This allows some powerful time planning scenarios, some examples of which are discussed below.

Work and Personal Tasks

Probably the most obvious use is for scheduling work tasks during work time and personal tasks during personal time. In this case you would set up 2 sets of **Working hours**, perhaps called "Office Hours" and "Personal Task Time". How? You then assign these **Working hours** to each task, as appropriate. How?

Getting Work Done During Commute Time

If you have a regular commute to and from work, it may be that certain types of work can be carried out during this journey. For example, if you commute on the train, you may wish to read reports during this time. To schedule tasks specifically during your commute time, create a set of **Working hours** to represent this time and assign these hours to the tasks in question. How? You may also have some tasks that could be done during commute time, or could be done during normal work time, it doesn't matter. In this latter case, create a set of **Working hours** that encompasses both your normal work day and your commute time, and assign these hours to such tasks. For example, if you work from 9am to 5pm and commute from 8 am to 9am and 5pm to 6pm, you would create a set of **Working hours** from 8am to 6pm.

Getting Low Priority Tasks Done

Low priority tasks are usually at the tail end of your task list and are generally the last things to get done. However, there is a danger that they'll never get done, because higher priority tasks keep getting inserted above them. To make sure these tasks do get worked on, you may wish to devote some time specifically to low priority tasks. For example, the last 2 hours on Friday afternoon. To do this:

1. Create a set of **Working hours** for just 2 hours on Friday (or whatever times you choose). How?
2. Assign these hours to the low priority tasks. How?
3. Make sure your **Working hours** used for the other tasks also include the same 2 hours on Friday, since we still want to use this time even when there are no low priority tasks to do.
4. Set Outlook's standard **task priority** setting on these tasks to **Low**.
5. On the **Tasks** tab of Taskline's dialog, set the first **Order by** to **Priority (Low/Medium/High) Descending**. This will schedule the low priority tasks first. This may seem counter intuitive, but it will ensure that the low priority tasks use up the Friday afternoon slots first. Once there are no remaining low priority tasks, the remaining (higher priority) tasks will be scheduled into these slots instead.

Working Out of Hours

You may have a need to work on certain tasks at odd hours, for example working late one night to get something finished. You can force a task to start or end at any time you wish by placing a **Start on** or **Finish on constraint** on the task and then assigning the standard "24/7" **Working hours**, which are set up to allow working 24 hours per day, 7

days per week.

Dividing Your Time – Working in Several Locations or on Several Projects

You may work at different offices and only certain tasks can be done at certain offices. Or you may work on several projects at once and wish to divide your time equally between them. Creating **Working hours** specific to each office or project will allow you to address this requirement in a simple and flexible way.

Spreading a Long Task Out Over Several Days

Taskline currently allocates time for all of a task before moving on to the next one. This is usually the most productive way of working. However, there may be times when you want to spread a long task out over several days, for example working 2 hours per day on it. You can address this requirement by creating a set of **Working hours** for 2 hour each day, and assigning these to the task.

Tip

- The **Max time per day** and **Max time per week** settings offer a better way to spread a long task out over time, if you don't mind which time slots allocated. More.

Modeling Recurring Tasks

If, for example, you had a task that recurred every Monday for 1 hour each morning, you could use the same technique described in the previous section to represent this. Specifically in this case, you'd create a 10 hour task and assign to it **Working hours** that were restricted to 1 hour on Monday morning.

Tip

- In the same way, you can also use the **Max time per day** and **Max time per week** settings to represent recurring tasks. More.

Accounting for Logistical Considerations

You may need to take into account certain task restrictions or preferences when scheduling your work. For example, certain tasks may need a piece of equipment that you only have occasional access to. Or perhaps some tasks can only be done when a colleague is also in the office. Or you may simply wish to group together similar tasks, for example you may like to reply to emails first thing in the morning. Again, **Working hours** can be used to address all of these requirements.

The Getting Things Done Outlook Add-In

Taskline's named Working hours support the concept of GTD **Actions**, such as @Home and @Office. Simply create **Working hours** with the same names as GTD **Actions** and with the hours defined appropriately. Taskline will then automatically match **Action** (which is set by using an Outlook **category**) to the **Working hours** of the same name. There is no need for you to open the task and set the Working hours manually. More about GTD

Related Topics

Setting Your Working hours

The Taskline Task Form in Outlook

Delegating Tasks

Outlook has a system of task delegation, whereby a task can be delegated to another person. You delegate a task by clicking on the **Assign Task** toolbar button on the task form. Thus one person's task list could consist of tasks they have entered themselves, tasks delegated to them by others, and tasks they have delegated to others.

Delegation is an Outlook feature. Please consult the Outlook documentation for information on how to use it.

You can delegate Taskline tasks in the same way that you can delegate standard Outlook tasks. If the recipient has Taskline, they will see Taskline tasks, otherwise they will see a standard Outlook task.

When scheduling your tasks, Taskline ignores tasks that have been delegated to others, as someone else is carrying them out for you.

Important

- There is an issue with Outlook in that delegated tasks lose all the values in User Defined Fields. This impacts delegating Taskline tasks as Taskline's custom fields, such as **Scheduled start** and **Priority (A1)**, are lost when a Taskline task is delegated

Preparation and Travel Time on Appointments

You can tell Taskline to leave time before and after an appointment free of scheduled tasks, for example for traveling time to and from meetings.

You can define a default traveling time for all appointments on the **Calendar** tab of the **Taskline** dialog. You can then enter a value in the **Before** and the **After** boxes. This is the amount of time in minutes or hours that you want Taskline to allow before and after an appointment on the Outlook Calendar.

For example, you might need 15 minutes to travel to most of your appointments on your Calendar, including your off-site meeting at 2:30. So you enter "15 m" in the box. As a result, Taskline schedules your work to end at 2:15 PM, 15 minutes before your 2:30 meeting. This gives you enough time between the end of the task and the beginning of the meeting to leave your office and get to the meeting on time.

You should remember that the settings for an individual appointment override this default setting, when you enter special tokens in the **Subject** box of the appointment.

Overriding the Default Times Before and After an Appointment

Taskline Professional Edition allows you to override the default appointment allowance times for individual appointments. To do this, place the following text, with the times adjusted accordingly, anywhere in the appointment **Subject** box:

Note

- Spaces are optional.
- If the time unit is omitted, minutes are assumed.

{30 m / 1 h}	30 minutes before the appointment and 1 hour after
{/ 1 h}	Use the default time before the appointment and 1 hour after it
{1 h /}	Use the default time after the appointment and 1 hour before it
{30 m}	30 minutes before and after an appointment

Example appointment subject: "Strategy meeting at head office {1.5h}". This tells Taskline to leave 1.5 hours free before and after the appointment.

Related Topics

Calendar tab

Setting Start and Due Dates for Tasks

1. Click Settings in Outlook (on Outlook 2007, click Taskline) to start Taskline and display the Taskline dialog.
2. On the **Options** tab, do one of the following:
   - Select the **Taskline should set Start and Due to the Scheduled dates** check box. This action ensures that Taskline updates the **Start Date** and **Due Date** boxes on the **Task** tab when you open the task, as well as the **Scheduled start** and **Scheduled end** dates on the **Taskline** tab. Keeping these dates updated can be useful under the following circumstances:
     - You want these dates to be as up-to-date as possible.
     - You have existing standard views that display **Start Date** and/or **Due Date.**
     - Outlook uses **Start date** and **Due date** by default in certain views, such as the **Task Timeline** view, the **Next Seven Days** view and the **Overdue Tasks** view. If you use these views, you should set options so that Taskline updates the **Start date** and **Due date** each time you click the Taskline button on the toolbar.
   - Clear the check box if you want only the **Scheduled start** and **Scheduled end** dates modified. Not updating **Start date** and **Due date** can be preferable under the following circumstances:
     - You want to leave your original date estimates in the **Start Date** and **Due Date** fields unchanged, so that you can later compare how you actually got on with how you initially thought you would get on.
     - Outlook regards uncompleted tasks with a **Due Date** in the past as being overdue, and these are shown in red by default, which can be useful. If you want to take advantage of this feature, have Taskline update **Start** and **Due dates** initially, and then turn this updating off once you are happy with your schedule. **Due dates** then stays unchanged, and tasks that get behind schedule are shown in red. If you subsequently get swamped out with too much red, you can always have Taskline update the **Start** and **Due dates** again, to give yourself a fresh start.
   - Click **Restore My Original Dates** to reapply the dates you had before you ran Taskline.

Tip

- For more information about options and settings on any dialog box, click the Question Mark button (or depending on your Windows version) at the top right hand corner of the dialog and then click a dialog option.

Related Topics

Options for Start and Due Dates

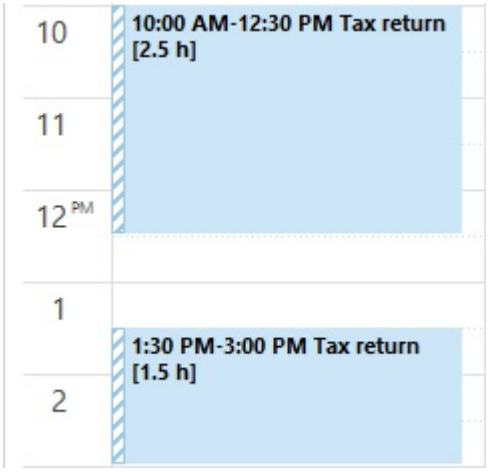
Defining the Order in Which Tasks are Scheduled

Task Constraints

Predefined Outlook Views

Splitting Tasks During Scheduling

When Taskline schedules your tasks, the software places the tasks into available time slots. However, if a task requires more time than a time slot has available, Taskline splits the task into shorter parts, according to the default settings for the software. For example, the following "Tax return" task gets split, with some work scheduled before lunch and some after lunch:



Usually the default way that Taskline splits tasks is sufficient. However, sometimes you might want more control:

- For some tasks, you might want to specify the minimum length of time for each part of the task.
- At other times, you might want to schedule an entire task in one time slot, without dividing the task into shorter parts. In this case, you need to completely turn off task splitting for a specific task.

The default Taskline setting is to split tasks and schedule any remaining part into the next available time slot, no matter how short the slot is. However, you may want to control the length of each part. You can do this when you set a minimum number of hours or minutes that Taskline can split a task into. For example, if you work more efficiently in one-hour increments, you would not want to schedule part of a task in a time slot that lasts only thirty minutes. You would want each part of the task to last at least one hour.

You can set a default minimum number of hours or minutes for all split tasks by clicking the Taskline button and then selecting the **Options** tab. You can enter a value in the **Default minimum task split** box. Now, when Taskline schedules a task and encounters conflicting items, the software splits the task into parts no shorter than the value that you enter.

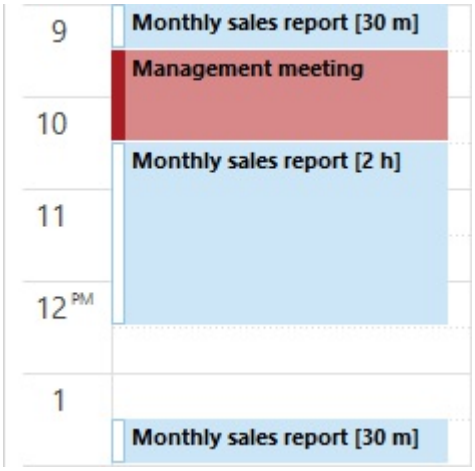
To allow Taskline to split a task, the **Task can be split** check box, on the **Taskline** tab of the task form in Outlook, must be selected. This check box is selected by default when you create a task. On the other hand, if you want to completely prevent Taskline from splitting a specific task, open the task and clear the **Task can be split** check box.

Tips

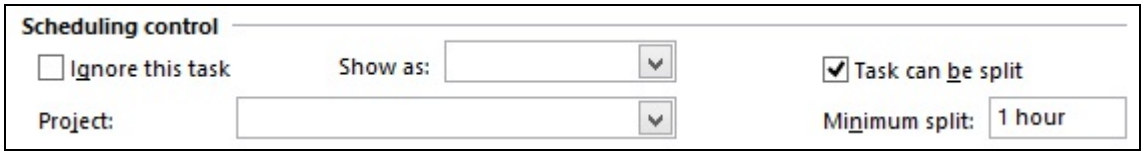
- For specific tasks, you can also override the setting in the **Default minimum task split** box on the **Taskline** dialog by setting the minimum number of hours that Taskline can divide that specific task into. To do this, open the task in Outlook and enter a value in the **Minimum split** box on the **Taskline** tab of the **Taskline** form.
- If the task reschedule is producing results that are difficult to understand, you can use the **Advanced Options** dialog to tell Taskline to temporarily ignore task split

settings. How? This should simplify the process and help you understand how results are arrived at.

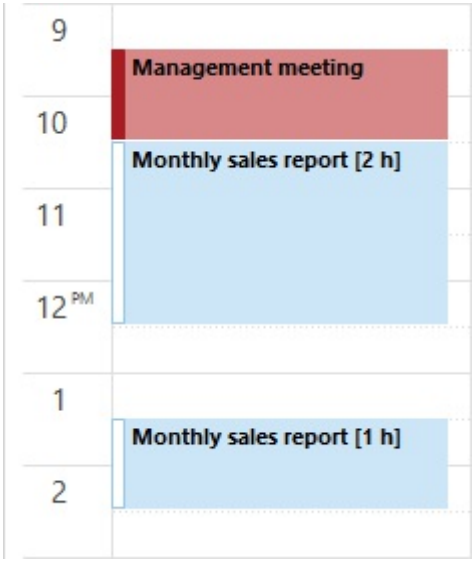
For example, let's say that you start work at 9:00 AM and take lunch from 12:30 PM to 1:30 PM. You have a monthly sales report to write that will take you 3 hours. You also have a meeting at 9:30 AM for 1 hour. With Taskline's default task splitting settings, the monthly sales report task finishes at 2:00 PM, and gets split into 3 parts:



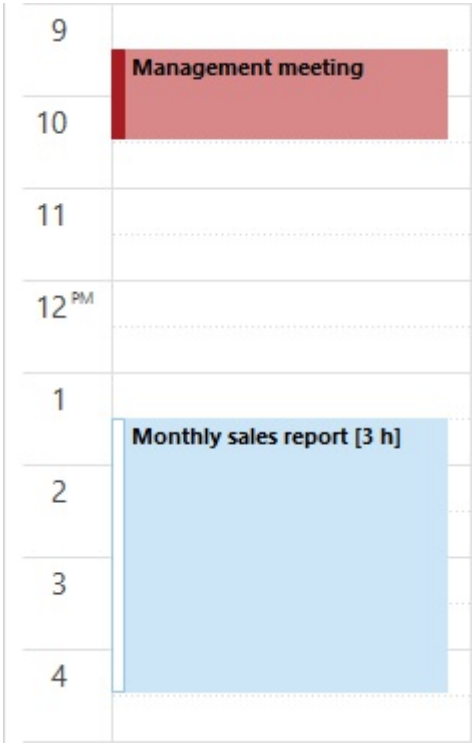
You then decide that you don't want to work on this task for less than 1 hour at a time, so you open the task and set the **Minimum split** to "1 h":



This change also means that the task finishes somewhat later now, at 2:30 PM:



You further decide that you would rather work on this task without interruption, so you open the task and clear the **Task can be split** check box. The task now finishes at 4:30 PM:



Note

- Note how this results in a less optimal schedule, with tasks getting completed later and available time not being fully utilized. This is not untypical and hence restricting task splitting should only be done sparingly. However, in a schedule with many tasks, other tasks could fill the unused time slots, assuming that their own task splitting settings allowed this.

Related Topics

Recurring Tasks and Working on a Task for Only Part of the Day or Week

Taskline Dialog Box

Taskline Form

Recurring Tasks and Working on a Task for Only Part of the Day or Week

These features are only available on Taskline Professional Edition.

Sometimes you may wish to:

- Spread a long task out over several days or weeks, working on it for maybe just a few hours a day.
- Work on several tasks at once, dividing your time between them.
- Repeat a task, for example you might wish to spend 30 minutes reading an industry journal every Friday.

You do these by using the **Max time per day** and **Max time per week** settings. These are in the **Scheduling control** section of the Taskline task form in Outlook. For example, let's say that you work 8 hours a day, 5 days a week and that you have a 16 hour task to complete:

- With both **Max time per day** and **Max time per week** unset, the task will get scheduled for 2 contiguous days. **Note:** Like all the examples here, this assumes that no other appointments or higher priority tasks influence the scheduling.
- Let's say that the task is boring and you only fancy doing a bit each day. If you set **Max time per day** to 2 hours, the task will now get scheduled over 8 working days, 2 hours each day.
- Let's assume that the task is a report that you want to spread out over 4 weeks, writing it as the information you require gradually comes in. Set **Max time per week** to 4 hours to achieve this.

Tips

- You can set both **Max time per day** and **Max time per week** on the same task. This gives you a great deal of flexibility as to how longer tasks are scheduled.
- **Max time per day**, **Max time per week**, **Minimum split** and task constraints can all interact during task scheduling and as a consequence it can sometimes be difficult to understand why Taskline has scheduled tasks in the way it has. To simplify matters, and help you understand the results of a reschedule, Taskline has options to switch off certain task settings, such as **Minimum split**. These are in the **Understanding Taskline** section of the **Advanced Options** dialog.

Recurring Tasks

If you have a task you wish to do repeatedly, you can use the **Max time per day** or **Max time per week** settings to represent this. For example, if you wish to spend 1 hour a week catching up on email newsletters, you could set up a 12 hour task and set **Max time per week** to 1 hour. This would of course stop after 12 weeks, so you might wish to change this number, or create a new task after 12 weeks, as appropriate. If you only wanted to do this reading on a Friday, you could assign the task **Working Hours** that only had working time on a Friday. This would still allow Taskline the flexibility to schedule that work any time on Friday, fitting in with your other work. But if you specifically wanted to do this reading between say 4pm and 5pm, or you wanted a task with a more complicated recurring pattern, you would be better off creating a recurring appointment instead.

You can also create a recurring task in Outlook. However, in this case Taskline will only schedule the next occurrence of that task.

Related Topics

Task Form

Recurring Tasks

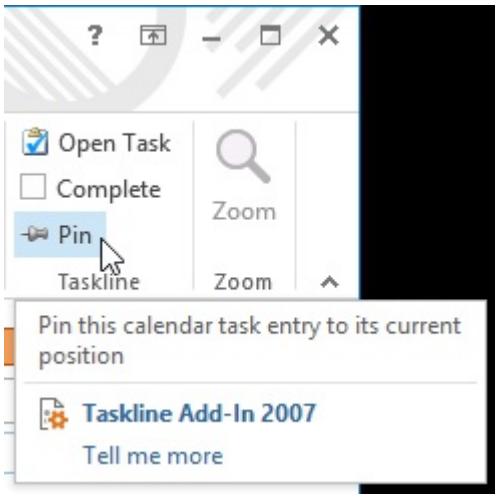
Splitting Tasks During Scheduling

Manually Overriding Some or all of Taskline's Scheduling

You may wish to use Taskline to automatically schedule your tasks but then perhaps make some manual adjustments to the resultant schedule. This could for example be because parts of a task can only be worked on while someone else is with you, or to work on parts of a task outside normal working hours, or simply personal preference.

You handle these cases by simply dragging a task entry in Outlook's calendar to a new time slot, or dragging its start or end time, or both. When you manually edit a calendar task entry in this way, it becomes *pinned*. Normally, calendar task entries get deleted and recreated each time Taskline runs. However, this does not happen to pinned entries – they stay untouched and survive a Taskline reschedule.

You can also pin a calendar task entry without changing it. Open the item and click the **Pin** button in the **Taskline** section of the **Appointment** ribbon. The calendar task entry will then stay put during subsequent task reschedules:



To unpin a calendar task entry, open the item and click the **Pinned** button in the **Appointment** ribbon.

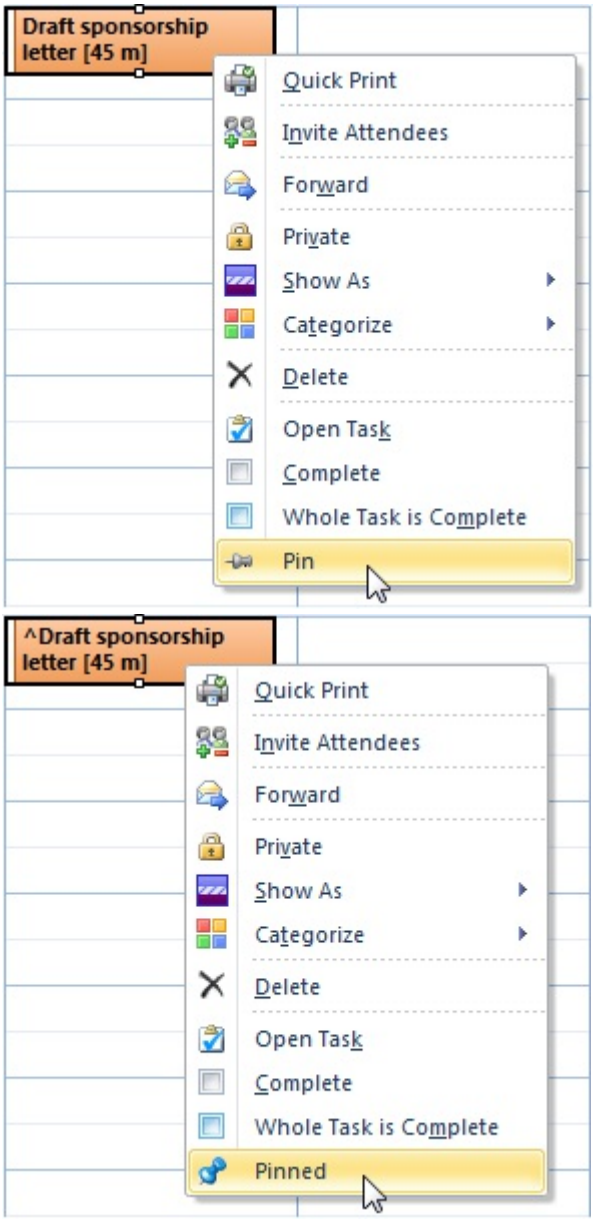
Pinned calendar task entries have their subjects' prefixed with a ^ character so you can tell at a glance which entries have been pinned.

Note

- Pinned calendar task entries that are Not Started and have an **End** date on or before the **First task starts at** date (i.e. those pinned items that are in the past) are automatically unpinned and rescheduled when you reschedule your tasks.

Tips

- You can also pin and unpin items by right clicking a calendar task entry in Outlook's calendar and selecting **Pin** or **Pinned** as appropriate from the popup menu. This is usually quicker as there's no need to open the item first:



- You can pin or unpin several tasks at once by selecting several calender task entries and right clicking any one of them. The clicked menu option will then apply to all selected calendar task entries.
- You can have pinned and unpinned items display in different colors. How?

Related Topics

Showing Your Tasks in the Outlook Calendar

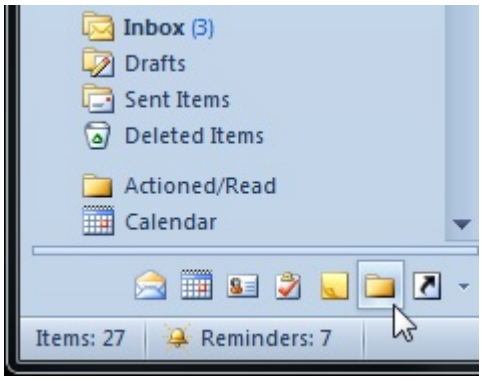
Choosing Outlook Folders

When you first install Outlook, you get one task folder, called **Tasks**, and one calendar folder, called **Calendar**. These are the only task and calendar folders you actually need, but you may find it convenient to create new folders. For example, you may wish to keep your current Outlook tasks in one folder and your completed work in another. Folders in Outlook are very much like folders in Windows Explorer. They are a hierarchical method of organizing items. They are hierarchical because folders can contain other folders. One difference is that Outlook folders can only contain items of one type. For example, task folders can only contain tasks (although you can place Office documents directly into folders that contain mail items, such as the Inbox).

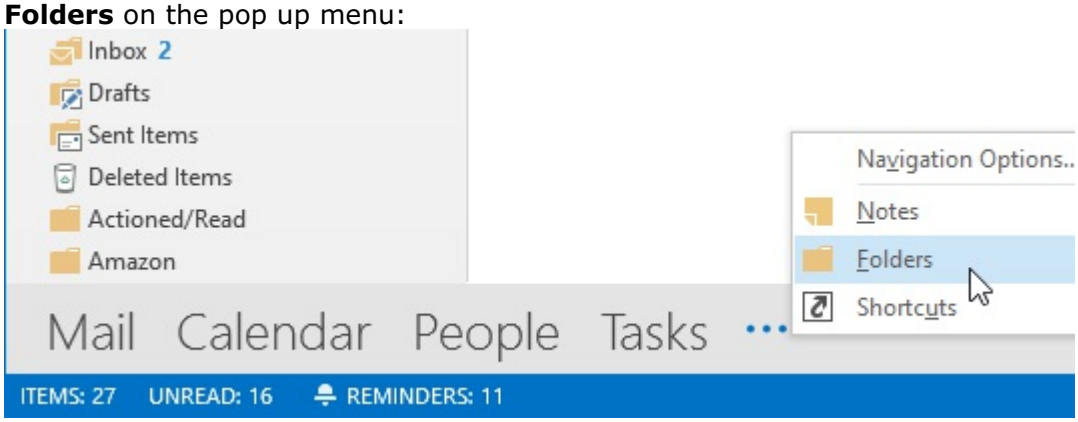
On the **Tasks** tab of the main dialog, Taskline lets you specify where the tasks are that you want scheduling, and where to optionally move completed tasks to. On the **Calendar** tab, Taskline lets you specify the folder containing your appointments, and optionally the folder that is to contain your task entries. In all cases, you specify your choice of folder by clicking on the **Select** button to bring up the **Select Folder** dialog. From here you can choose an existing folder, or create a new one.

Creating New Outlook Folders

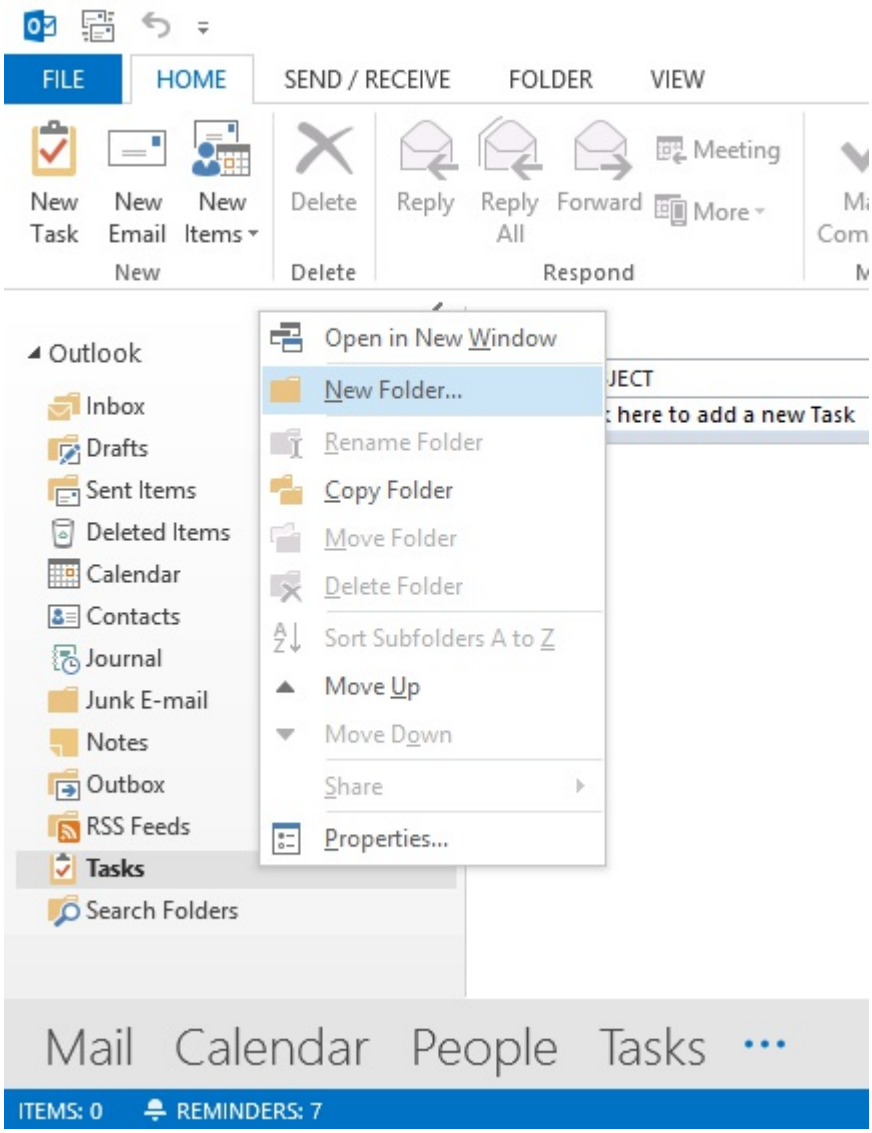
1. If Outlook's **Folder List** isn't already displayed, have Outlook display it:
   - In Outlook 2007 and 2010, click **View** → **Navigation Pane** → **Normal** and then click the **Folder List** icon at the bottom of the **Navigation Pane**:



   - In Outlook 2013, click '**...**' at the bottom of the main window and then click **Folders** on the pop up menu:



2. On the **Folder List**, right click an existing folder and click **New Folder** on the pop up menu:



The **Create New Folder** dialog will be displayed.

3. Type the name you wish to give your new folder into the **Name** box.
4. Click **OK** to have Outlook create the new folder.

Related Topics

Organizing Completed Tasks

Showing Your Tasks in the Outlook Calendar

Reminders

Outlook tasks and appointments can issue reminders before they are due to start. This can be an excellent memory jogger.

Taskline tasks introduce their own reminder system, so with tasks you have 2 choices; you can use either the standard Outlook reminder, or you can use Taskline's reminder facility. However, you cannot use both at the same time on the same task, because the Taskline reminder works by setting up the Outlook reminder for you.

Outlook Task Reminders

Open the task form for a task. On the **Task** tab you will see the **Reminder** check box. If you check this, Outlook will issue you a reminder at the date and time you specify.

Taskline Task Reminders

The standard Outlook reminders ask you to specify the exact date and time of the reminder. However, it is difficult to set a reminder time because you will not know when the task is due to start until it has been scheduled by Taskline, and even then it may change if you run Taskline again in response to a change in circumstances. Taskline task reminders address this issue by allowing you to set the reminder to an amount of time before the task is scheduled to start.

To set a Taskline reminder, go to the **Taskline** tab of the task form. At the bottom of the form, check the **Reminder** check box, and then enter the amount of notice you require before the task is scheduled to start. Note that the time entered is working time, not elapsed time. This means that non-working time (i.e. time when you are not at work or are on a break) is ignored when deciding when the reminder should be issued. For example, consider a task scheduled to start at 2pm on a working day that has a lunch break from 1pm to 2pm. If the task has a 30 minute reminder, that reminder will be issued at 12:30pm, rather than at 1:30pm when you're probably not there. If lunch was from 12pm to 1pm, then in this case working time and elapsed time are the same – the reminder would be issued at 1:30pm.

Taskline reminders work by setting up the standard Outlook reminder on your behalf. Thus you can't use both types of reminder on the same task at the same time.

If you set the Taskline reminder, you must clear the Taskline reminder to remove it. Clearing the standard Outlook reminder will not work, because it will just get set up again the next time you run Taskline.

When you clear the Taskline reminder, this clears the standard Outlook reminder as well.

Recurring Tasks

Taskline will schedule the next occurrence of a recurring task. By default, Taskline will attempt to place a recurring task on its **Start** date, or its **Due** date if no **Start** date is set. However, this behavior can be changed by setting the **Recurring tasks** options on the Advanced Options dialog.

You need to make sure that you mark recurring tasks as **Complete** as and when you finish each occurrence. Failing to do so will leave the task's **Start** and/or **Due** dates in the past, as only when a task is marked as **Complete** will Outlook generate a new task occurrence, with updated **Start** and **Due** dates

Note that the **Start** and **Due** dates of recurring tasks are never updated by Taskline, even if you have the **Taskline should set Start and Due to the Scheduled dates** option set. This is because changing the **Start** or **Due** date of a recurring task usually generates a new (and unwanted) task occurrence. However, Taskline can update the **Start** and **Due** dates of regenerating tasks, which are a specific type of recurring task. They generally represent something that needs doing repeatedly, but not on specific dates. For this reason, regenerating tasks that miss their dates will not mark the task as requiring attention.

Tips

- You can have Taskline delete completed occurrences of recurring tasks, if required. How?
- If you need *all* occurrences of a recurring task to be scheduled, we suggest you use a recurring appointment instead. The effect is quite similar.
- You can also use the **Max time per day** or **Max time per week** settings to represent recurring tasks. How?

Deferred and Waiting Tasks

Tasks that have their **Status** set to **Deferred** or **Waiting on someone else** will not be scheduled by Taskline and will have their **Scheduled start**, **Scheduled end** and **Week commencing** fields cleared.

Private Tasks

Private tasks are scheduled as normal by Taskline. **Private** tasks create private calendar task entries, if one of the options to create these is enabled.

Related Topics

Recurring Appointments

Recurring Tasks and Working on a Task for Only Part of the Day or Week

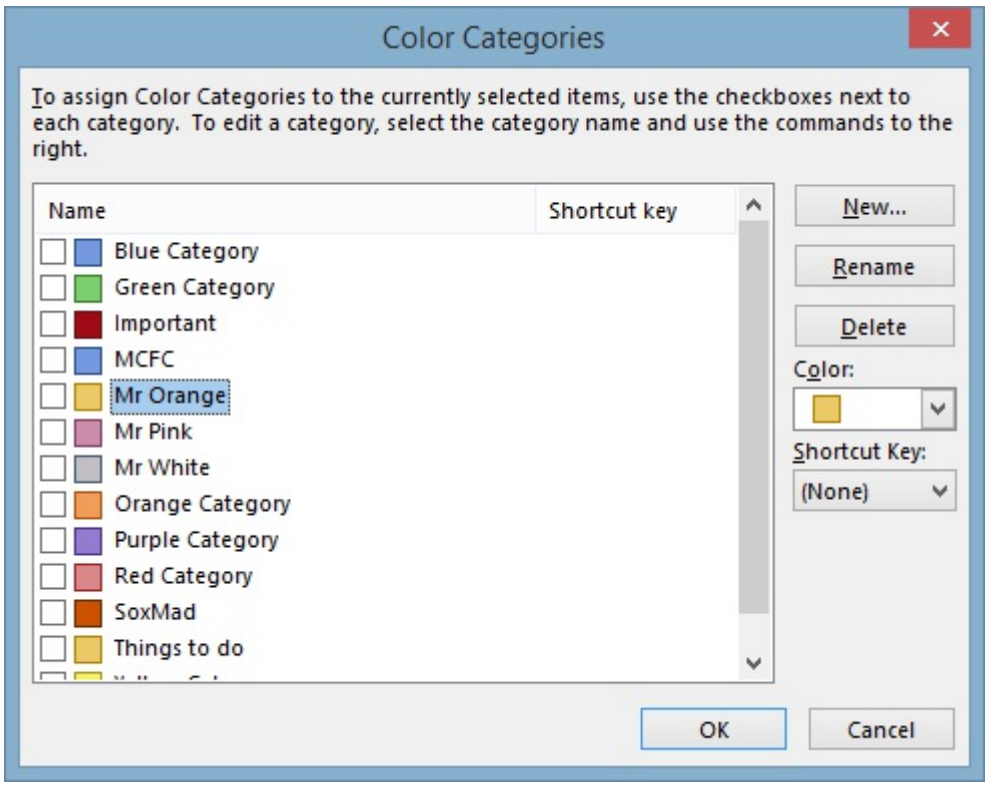
Advanced Options for Recurring Tasks

Tasks in Sub-Folders

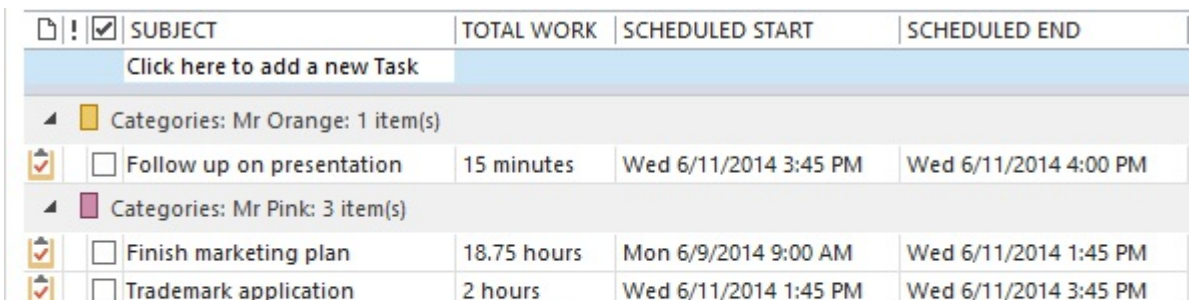
This version of Taskline will not schedule tasks in sub-folders. A good workaround is to create a **Project** (on the **Taskline** tab of the task form in Outlook) or a **Category** for each sub-folder, and assign that **Project** or **Category** to each task. Then, group your Outlook task view by **Project** or **Category**, as appropriate. This approach has the advantage over multiple folders in that you can see the tasks for more than one sub-folder in a single view.

For example, say you have three folders, one for each client, and you have decided to use **categories** rather than **projects**:

Add 3 new **categories**, one to represent each sub-folder:



Then assign a category to one task in each sub-folder, by clicking on the **Categories** button on the **Task** tab of the Task form. Group the view on **Category** How? and then drag each task in turn to the correct group. This automatically assigns the category for you.



New web page design	1.5 weeks	Wed 6/11/2014 4:00 PM	Fri 6/20/2014 4:00 PM
Categories: Mr White: 2 item(s)			
Web site improvements	30 hours	Mon 6/2/2014 9:00 AM	Thu 6/5/2014 5:30 PM
Search engine submitting	7.5 hours	Fri 6/6/2014 9:00 AM	Fri 6/6/2014 5:30 PM

To create a new category, open any task to display the Task form and go to the **Task** tab. Click the **Categorize** button, and then click **All Categories**.

Related Topics

More on Grouping

Projects

Automated Background Task Scheduling

The Taskline command line option **/NoDialog** allows you to run Taskline in the background using the Windows task scheduler. When Taskline runs in the background, you will not have the opportunity to change any Taskline settings, so you must make sure that the current settings are appropriate. In particular, running in the background will usually require that the **Default to current date and time** option, on the **Tasks** of the Taskline dialog, is enabled, so that tasks are always schedule from time now. To change settings, start Taskline normally, make any required changes, and then click **Apply** to save your changes and **Cancel** to close the dialog without running Taskline.

Now, set up a schedule for running Taskline using the Windows Task Scheduler:

Instructions for Windows XP

1. Click **Start menu** → **(All) Programs** → **Accessories** → **System Tools** → **Scheduled Tasks**.
2. Double click **Add Scheduled Task**.
3. The **Scheduled Task Wizard** will appear. Click **Next**.
4. On the list of programs, click Taskline and then click **Next**.
5. Choose when you'd like to schedule your tasks, for example **Daily**. Click **Next**.
6. Choose the appropriate start time and date settings and then click **Next**.
7. If you have to enter a password when you log on to your computer, you will need to enter the same password here. Then click **Next**.
8. Click the **Open advanced properties for this task when I click Finish** check box and then click **Finish**.
9. On the properties dialog that appears, click in the **Run** edit box. Move the cursor to the end of the box and type a space followed by "/nodialog". Click **OK**.

Instructions for Windows Vista

1. Click **Start menu** → **All Programs** → **Accessories** → **System Tools** → **Scheduled Tasks**.
2. In the list of Actions, click **Create Basic Task**. The **Create Basic Task Wizard** will appear.
3. Now continue from Step 4 in the Windows 7 and Windows 8 instructions below.

Instructions for Windows 7, Windows 8 and Windows 8.1

1. Start Windows **Control Panel** and click **Administrative Tools**. If you are grouping the **Control Panel** items by **Category**, you will need to click **System and Security** first.
2. In the new **Administrative Tools** window that opens up, double click **Task Scheduler**.
3. In the **Task Scheduler** window, click **Action** menu → **Create Basic Task**. The **Create Basic Task Wizard** will appear.
4. In the **Name** box, type "Taskline". Click **Next**.
5. On the **Task Trigger** page, choose when you'd like to schedule your tasks, for example **Daily**. Click **Next**.
6. Choose the appropriate start time and date settings and then click **Next**.
7. On the **Action** page, click **Start a program**. Click **Next**.

8. On the **Start a Program** page:
    i. Click the **Browse...** button next to the **Program/Script** box.
    ii. Locate your Taskline install folder. By default this is:
        - 32-bit versions of Windows: C:\Program Files\ResultsWare\Taskline\<UserName>
        - 64-bit versions of Windows: C:\Program Files (x86)\ResultsWare\Taskline\<UserName>
    iii. Select the Taskline.exe file and click the **Open** button.
    iv. Enter "/NoDialog" (without the double quotes) in the **Add arguments** box.
    v. Click **Next**.
    vi. Click **Finish**.

Important

- The **/NoDialog** option has the following effects:
    - It runs Taskline immediately, rather than display the dialog.
    - It does not display the progress box.
    - It does not display the **Summary of Task Schedule** dialog, even if the **Show summary when task reschedule is complete** is enabled.
    - An alert is not displayed if tasks constraints can't be met. As such, you will need to ensure that you have told Taskline to highlight the subject of any task with a missed constraint. How?

  Although an alert is not displayed if tasks constraints can't be met, other alerts are still displayed if unexpected errors arise during scheduling.
- If you have to enter a password when you start Outlook, then background scheduling will only work if Outlook is already running. Otherwise, when Taskline starts up Outlook, it will stay inactive, waiting for someone to enter the Outlook password.

Taskline Dialog Box

You can access the Taskline dialog box by clicking Settings (on Outlook 2007, click Taskline) in Outlook or clicking the Taskline icon on the Desktop. The dialog box displays several tabs: **Tasks**, **Projects**, **Calendar**, **Working Week**, **Working hours**, **Options** and **Help/About**.

	This button displays Help for an item on the dialog box. When you click this help button, the cursor will change to an arrow and a question mark. If you click one of the controls on the dialog box, a help window displays information on the control you just click.
	This button closes the dialog box. It has the same effect as clicking **Cancel.**
OK	Click **OK** to save all of your changes and run Taskline.
Cancel	Click **Cancel** to throw away any changes and close the dialog box without running Taskline. **Cancel** does not lose any changes that have been previously saved by clicking **OK** or **Apply.**
Apply	Click **Apply** to save your changes. **Apply** does not run Taskline and the dialog box will stay on screen. Note that **Apply** only becomes available if unsaved changes exist.
Help	Click **Help** to display this help file. The Help topic for the current tab appears.

Related Topics

Tasks Tab

Projects Tab

Calendar Tab

Working hours Tab

Working Week Tab

Options Tab

Help/About Tab

Tasks Tab

First task starts at

First task starts at	Enter the date and time that the first task in your task list should start. All other tasks will then follow on after that task. Note that a constraint on the first task, for example a **Start On** constraint, can override the **First task starts at** date. The date and the time should be separated by a space. You can also enter a date by clicking on the arrow to the right of the **First task starts at** box to display the calendar. You can then select a date by clicking on it with the mouse. More.
Default to current date and time	Click this option to have Taskline enter the current date and time for you in the **First task start at** box. If this is outside normal working hours, it is rounded up to the start of the next working period. For example, if you work 8am to 5pm Monday to Friday, and you click this option on a Saturday, Taskline enters 8am next Monday.

Schedule tasks in the following order

Order by, **And then by**	These drop down lists allow you to define the order in which your tasks are scheduled. **Natural Order** or **Priority (A1)** are common choices, but you can order by many other fields too, including Outlook custom fields More. You can override this order with task constraints, such as a **Finish On** constraint. More. You can also choose whether to order your chosen task property into ascending or descending order. For example, ordering tasks by **Descending Total Work** schedules the longest tasks first.

Folders

Schedule the tasks in...	Click the **Select** button to choose which Outlook **Tasks** folder Taskline should schedule. The text to the left of the **Select** button tells you which folder is currently selected.
Move completed tasks to...	You can optionally have Taskline move completed tasks to a different Outlook folder, to help keep your task list focused and uncluttered. To enable this feature, click this option, and choose a suitable folder by clicking on the **Select** button. More about task progress.
Delete completed occurrences of recurring tasks	Select this option to have Taskline always delete completed occurrences of recurring tasks, regardless of the **Move completed tasks to...** setting. Such tasks are moved to the Deleted Items folder, rather than being permanently deleted.

Related Topics

Taskline Dialog Box

Projects Tab

Calendar Tab

Working hours Tab

Working Week Tab

Options Tab

Help/About Tab

Projects Tab

Tasks can be assigned a **Project** using the **Taskline** tab of the task form in Outlook. How? This tab of the Taskline dialog allows you to manage those projects.

Project list box	This is the list of current projects. You can click a **Project** to select it. Use Control+Click to select more than one **Project**, or Shift+Click to select a range of **Projects**. If, on the **Tasks** tab of the dialog, you have chosen to **Order By Project**, then projects will be scheduled in the order shown in this list. Select one or more projects and use the **Move Up** and **Move Down** buttons to change this order.
Move Up **Move Down**	If, on the **Tasks** tab of this dialog, you have chosen to **Order By Project**, then projects will be scheduled in the order shown in the list. To change this order, select one or more **Projects** and click the **Move Up** or **Move Down** buttons.
Delete	You can select one or more **Projects** in the list and click **Delete** to remove them. You cannot delete projects that are current assigned to tasks.
Insert New	To create a new project, enter a unique name in the box to the left of the **Insert New** button and click the button. Alternatively, simply type in a new project name on the **Taskline** tab of the task form in Outlook.

Related Topics

Using Projects

Project and The Taskline Task Form in Outlook

Taskline Dialog Box

Tasks Tab

Calendar Tab

Working hours Tab

Working Week Tab

Options Tab

Help/About Tab

Calendar Tab

Creating task entries in the calendar

Create for tasks that are Not Started or In Progress	Click this option to have Taskline create calendar task entries for tasks, or parts of tasks, that are still outstanding. Task entries enable you to see your tasks in Outlook's calendar view, as well as the task list.
Keep a record of completed work	Select this check box to have Taskline keep calendar task entries that have been marked as complete. This enables you to maintain a record in your calendar of exactly what you've worked on, and when. Deselect the check box if you are only interested in current and future work. In this case, Taskline will delete completed calendar task entries when it runs. More about task progress.
Create all day events for milestones	Click this checkbox to have Taskline create an all-day event on the Outlook Calendar for each task that you designate as a milestone. You can designate a task as a milestone by entering 0 in the **Total work** box on the **Taskline** tab of the **Taskline** form. By default, tasks with zero Total work are ignored by Taskline, so you must uncheck the **Ignore this task** checkbox, on the same tab, to have Taskline process the task as a milestone.

Options for task entries in the calendar

Mark all as private	This option affects who can see your calendar task entries when your Outlook Calendar is being shared. If this option is selected, all task entries are created as private, so that only you can view them. If this option is not clicked, only calendar task entries representing private tasks will be created as private.
Limit tasks in calendar to first ... days	You may not wish to have your calendar filled up with tasks for many days or weeks ahead. Sometimes, it helps to just focus on short term goals. This feature allows you to limit how many days in the calendar, after the **First task starts at** date, display scheduled tasks.
Show as	Completed work is always represented using appointments on the calendar, if the option to create calendar task entries for completed work is enabled. However, outstanding work can be represented by appointments or all day events. You can choose from the following options: ▪ **Appointments, with accurate start and end dates and times –** The tasks display like appointments that begin and end with the **Scheduled start** and **Scheduled end** dates that appear on the **Taskline** tab of the **Taskline** form. ▪ **All day events from task Scheduled start to Scheduled end –** The tasks display as all-day events, in a continuous box beginning and ending with the **Scheduled start** and **Scheduled end** dates that appear on the **Taskline** tab. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears from Monday to Wednesday. ▪ **All day events on task Scheduled start date –** The tasks display as all-day events on the **Scheduled start** date that appears on the **Taskline** tab. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Monday only. ▪ **All day events on task Scheduled end date –** The tasks display

	as all-day events on the **Scheduled end** date that appears on the **Taskline** tab of the form. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Wednesday only. ▪ **All day events on task Scheduled start, unless Finish constraint –** The tasks display as all-day events on the **Scheduled start** date, which is shown on the **Taskline** tab of the form. However, if the task has a **Finish on** or **Finish on or before** constraint, the All day event is placed on the task's **Scheduled end** date. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Monday, unless you have entered a Finish constraint. In that case, the all-day event is shown on Wednesday. ▪ **All day events on task Scheduled end, unless Start constraint –** The tasks display as all-day events on the **Scheduled end** date, which is shown on the **Taskline** tab of the form. However, if the task has a **Start on** or **Start on or after** constraint, the All day event is placed on the task's **Scheduled start** date. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Wednesday, unless you have entered a Start constraint. In that case, the all-day event is shown on Monday.
Define Subject	Click this button to display the **Calendar Task Entry Subject** dialog box, which allows you to customize the appointment subject Taskline assigns to calendar task entries. More.
Define Colors	Click this button to display the **Calendar Task Entry Colors** dialog. This allows you to set up various colors for the task entries that Taskline creates in Outlook's calendar. More.
Show time as	Use this drop down list to set the **Free/Busy** status of your task entries in Outlook's calendar. This is a default value that can be overridden per task by using the **Show as** drop down list on the Taskline tab of the task form in Outlook.
Default time allowances before and after an appointment	
Before	Enter the amount of time in minutes or hours that you want Taskline to allow before the start of an appointment on the Outlook Calendar. This is useful if you want to allow for travel or preparation time before an appointment. More. For Taskline Professional Edition only, this is treated as a default value and the settings for an individual appointment can override this setting. How?
After	Enter the amount of time in minutes or hours that you want Taskline to allow after the end of an appointment. This is useful if you want to allow for travel time after an appointment. More. For Taskline Professional Edition only, this is treated as a default value and the settings for an individual appointment can override this setting. How?
Folders	
My appointments are in…	Click the **Select** button to choose the folder that contains your appointments. Taskline will schedule your tasks around your appointments, so that the two don't overlap. The text to the left of the **Select** button tells you which folder is currently selected.
Write task entries to…	Click the **Select** button to choose the folder that is to contain your task entries. This can be the same as your appointments folder, and the text to the left of the **Select** button tells you which folder is currently selected.

Task entries enable you to see your tasks in Outlook's Calendar view, as well as the task list. More. If the **Select** button is disabled, click the **Create for tasks that are Not Started or In Progress** option, which is also on the **Calendar** tab of the dialog box.

Related Topics

- Calendar Task Entry Colors
- Calendar Task Entry Subject
- Taskline Dialog Box
- Tasks Tab
- Projects Tab
- Working hours Tab
- Working Week Tab
- Options Tab
- Help/About Tab

Working Week Tab

This tab is only present on Taskline Standard Edition.

I take breaks at the following times during the day	
From	If you take a regular break during the day, such as a lunch break, enter the time you start your break in the first available **From** box.
To	If you take a regular break during the day, such as a lunch break, enter the time you end your break in the **To** box.
Working day	
I start work at	This field displays the time you are ready to start working on your tasks on a normal working day. **Note** The **I start work at** and **I stop work at** times can only be changed from within Outlook: ▪ Outlook 2007 – click **Tools** menu → **Options** tab → **Calendar Options** button. On the **Calendar Options** dialog, you will see the **Start time** and **End time** settings. ▪ Outlook 2010 and 2013 – click **File** (**FILE** on Outlook 2013) → **Options** → **Calendar** tab. Then update the **Start time** and **End time** settings as required.
I stop work at	This field displays the time that you stop working on your tasks on a normal working day. The value shown is read-only. See Note above for details on how to change this.
Working hours per day	Enter the number of hours you work each working day. For example, if you start work and 9:00am, end work at 5:30pm, and take a 1 hour break during the day, enter 7.5 hours. Note that this setting does not affect the length of the working day. Rather, it is used by both Outlook and Taskline to convert between days and hours. For example, if a value of 8 is supplied, Outlook and Taskline will know that when "2d" is entered for, say, task **Actual Work**, this equates to 16 hours.
Working hours per week	Enter the number of hours you work each week. Note that this setting does not affect the length of the working week. Rather, it is used by both Outlook and Taskline to convert between weeks and hours. For example, if a value of 40 is supplied, Outlook and Taskline will know that when "2w" is entered for, say, task **Total work**, this equates to 80 hours.
I work on the following days	
Mon, Tue etc	Select each day you work.

Important

- You cannot predict all tasks in advance and hence you should make an allowance in your schedule for unpredictable or spontaneous events, such as phone calls. Build some contingency (or slack time) into your schedule. You could do this by adding a day time break to represent the contingency, for example. Over-estimating the **Total work** for your tasks is another good method.

Tip

- Consider planning some personal or thinking time at the start of the day, perhaps to plan the day's work. You could do this by entering a start work time slightly later than the time you actually arrive at work. Similarly, you can schedule thinking time at the end of the day, perhaps to plan the next day's work.

Related Topics

Taskline Dialog Box

Tasks Tab

Projects Tab

Calendar Tab

Options Tab

Help/About Tab

Working Hours Tab

This tab is only present on Taskline Professional Edition.

Working Hours	
Working hours	Use this list to select the **Working hours** you wish to view or edit. The **Working hours** define the times during which tasks assigned these hours can be scheduled.
New	Click the **New** button to create a new set of **Working hours**.
Delete	Click the **Delete** button to delete the currently selected **Working hours**. ▪ You cannot delete **Working hours** that are currently assigned to one or more tasks. ▪ There must always be at least one set of **Working hours** defined, so if you delete the last remaining set, Taskline will automatically insert a new set of hours called "Default work week".
Mon, Tue etc	You use these check boxes when you want to make the same change to several days. Select the check boxes for the days you want to edit. Then, when you make a change, all the selected days will be changed simultaneously. Clicking the check box at the head of the column is a shortcut for selecting or deselecting all seven check boxes in one operation.
Start work	Enter the time you are ready to start working on your tasks on this day. If you do not work this day, leave all the boxes on the row blank.
Stop work	Enter the time you stop working on your tasks on this day. Use 0:00 for midnight. If you do not work this day, leave all the boxes on the row blank.
From	If you take a regular break during the day, such as a lunch break, enter the time you start your break here.
To	Enter the time you end your break here.
1st, 2nd etc break	You can define up to 4 breaks during the day. Use these radio buttons to select which break you want to view or edit.
Options	
Default hours	If a task has no **Working hours** assigned, the **Default Hours** are used. You define which hours are the default ones by selecting this radio button.
Schedule tasks that have been assigned these hours	If you want Taskline to ignore (i.e. not schedule) all tasks assigned these **Working hours**, deselect this check box.

Important

- You cannot predict all tasks in advance and hence you should make an allowance in your schedule for unpredictable or spontaneous events, such as phone calls, interruptions etc. Build some contingency (or slack time) into your schedule. You could do this by adding a day time break to represent the contingency, for example. Over-estimating the **Total work** for your tasks is another good method.

Tips

- To assign **Working hours** to a task, select the hours from the **Working hours** drop down list on the **Taskline** tab of the task form in Outlook. Note that Taskline can sometimes automatically set **Working hours** for you, when **Working hours** have the same name as the **Project** or **Category**. More.
- Consider planning some personal or thinking time at the start of the day, perhaps to plan the day's work. You could do this by entering a **Start work** time slightly later than the time you actually arrive at work. Similarly, you can schedule thinking time at the end of the day, perhaps to plan the next day's work.

Related Topics

Setting Your Working hours

Working hours and The Taskline Task Form in Outlook

Using Different Working hours for Different Tasks

Taskline Dialog Box

Tasks Tab

Projects Tab

Calendar Tab

Options Tab

Help/About Tab

Options Tab

Task Start and Due dates

Taskline should set the Start and Due dates to the Scheduled dates

If this option is clicked, the **Start** and **Due** dates are always kept up-to-date and in step with the **Scheduled start** and **Scheduled End** dates. Any standard Outlook views that require correct **Start** or **Due** dates will work correctly and tasks that exceed their **Due** dates will be highlighted in red by Outlook. More about standard task views. However, any **Start** or **Due** dates you had previously entered will get overwritten, although the **Restore my original Start and Due dates** feature can restore these.

Clear this option to have Taskline leave the **Start** and **Due** date fields alone, and only update the **Scheduled start** and **Scheduled End** dates.

Notes

- This option is not available if you are ordering your tasks by **Due** date, because it's confusing to order by something that is about to get changed.
- The **Start** and **Due** dates of recurring tasks are never updated by Taskline, even if you have the **Taskline should set Start and Due to the Scheduled dates** option set. This is because changing the **Start** or **Due** date of a recurring task usually generates a new (and unwanted) task occurrence.
- This does not apply to regenerating tasks, which *are* affected by this setting. More

Restore my original Start and Due dates

If you run Taskline with the **Taskline should set Start and Due to the Scheduled dates** option enabled, Taskline resets all the **Start Dates** and **Due Dates** on your tasks. If you now want to get your original dates back again, click this button to restore any **Start** and **Due** dates previously overwritten.

Outlook task form initial tab (for existing tasks)

This option allows you to specify which tab is initially presented on the **Taskline** form in Outlook. New tasks always display the standard Outlook **Task** tab.

Miscellaneous

If a task constraint is missed, prefix task subject with

If you enter some text into this box, Taskline will prefix the subject of any task whose constraint cannot be met with this text. The prefix will be automatically removed once the constraint can be met. Leave this box blank if you don't want Taskline to highlight missed constraints in this manner. More.

Default minimum task split

Enter the minimum number of hours or minutes that you want Taskline to split a task into, when scheduling that task around other items, such as appointments and breaks. You can enter **h** to designate hours and **m** to designate minutes.

You can override this setting for individual tasks if you so wish by using the **Task can be split** and **Minimum task split** options on the **Taskline** tab of the task form in Outlook. More.

	In Outlook, when you create or modify a task and enter hours or minutes in the **Total Work** box, the **Task can be split** check box is selected by default. When Taskline schedules this task and encounters conflicts, such as appointments on the Calendar, the software breaks the task into shorter parts using the value that you enter. More about task splitting.
Show summary when task reschedule is complete	If this option is clicked, the **Summary of Task Schedule** dialog box is presented when Taskline has finished scheduling your tasks. More.
Re-number or re-letter Priority (A1)	Click this button to display options that allow you to change the **Priority (A1)** values of your tasks. More.
Import Tasks	Click this button to display a dialog that allows you to import tasks from a simple text list of task names. More.
Advanced Options	Click this button to see less frequently used options. More.

Related Topics

Advanced Options

Renumber or Re-letter Priority (A1)

Import Tasks

Taskline Dialog Box

Tasks Tab

Projects Tab

Calendar Tab

Working hours Tab

Working Week Tab

Help/About Tab

Advanced Options

Tasks

Show the Taskline tab for tasks in all Outlook folders	When this option is enabled, new tasks will always have the Taskline tab available. Otherwise, new tasks only show the Taskline tab if they are in your nominated **Schedule the tasks in...** Outlook tasks folder, which is set on the Tasks tab of Taskline's main dialog.
Require that all tasks are assigned a category	If this option is clicked, all new Taskline tasks created in Outlook must be assigned a **category**, and any existing tasks with a **category** cannot have their **category** removed, although it can be changed.
Keep Priority (Low/Medium/High) and Priority (A1) synchronized	Keeps **Priority** and **Priority (A1)** synchronized such that Low Priority corresponds to an **A1** letter C, Medium Priority corresponds to an **A1** letter B and High Priority corresponds to an **A1** letter A.
On new tasks, have 'Ignore this task' initially set	You can tell Taskline to ignore certain tasks by selecting the **Ignore this task** check box, which is on the **Taskline** tab of the Task Form in Outlook. For a new task, choose whether you want **Ignore this task** to be initially set or unset. Even if you have **Ignore this task** defaulting to being set, it will be automatically unset if some **Total work** is set on the task.
Clear Scheduled start and Scheduled end if task not scheduled	Some tasks are not scheduled, for example because the **Ignore this task** check box is selected or perhaps because the project a task belongs to is not scheduled. If this option is selected, then unscheduled tasks will have their **Scheduled start**, **Scheduled end** and **Week commencing** dates cleared by Taskline. This makes it easy to see which tasks have been scheduled, and which have not.
Don't display warnings for "Finish On" tasks that are scheduled early	If a task with a **Finish on** constraint is scheduled to finish before its constraint date, then normally Taskline treats this as a missed constraint. But setting this option means that finishing such tasks early is not a concern and Taskline will no longer identify the task as having missed its constraint.
Round 'Default to current date and time' to next	The **Default to current date and time** check box, which is on the **Tasks** tab of Taskline's main dialog, is rounded up to the next time interval that you set here. This time interval must be between 1 minute and 1 hour.

Recurring tasks

Schedule on Start date, if set	Taskline should schedule a recurring task on its Start date.
Schedule on or after Start date, if set	Taskline should schedule a recurring task on or after its Start date.
Ignore Start date	Taskline should ignore the Start date on a recurring task and schedule it just like any other task.
Schedule on Due date, if set	If set, Taskline will schedule a recurring task on its Due date, but only if the Start date is unset or the 'Ignore Start date' option is selected.
Schedule on or before Due date, if set	If set, Taskline will schedule a recurring task on or before its Due date, but only if the Start date is unset or the 'Ignore Start date' option is selected.

Ignore Due date	Taskline should ignore the Due date when scheduling a recurring task.

Calendar

Ignore 'Out of Office' appointments	Normally Taskline schedules your tasks around the appointments in your calendar, unless the appointment have **Show time as** set to **Free**. Select this option to have Taskline ignore **Out of Office** appointments, as well as **Free** appointments, so that tasks can be scheduled during time set aside for **Out of Office** appointments.
Ignore 'Tentative' appointments	Select this option to have Taskline ignore appointments with **Show time as** set to **Tentative** when it's scheduling your tasks. With this option not selected, which is the default setting, Taskline will schedule your tasks around **Tentative** appointments.
Ignore 'Working Elsewhere' appointments	This option is only available with Outlook 2013 and later. Select it to have Taskline ignore appointments with **Show time as** set to **Working Elsewhere** when it's scheduling your tasks.

Calendar task entries

Set reminders on calendar task entries	This option tells Taskline to put Outlook reminders on the calendar task entries created by Taskline. Since one task can give rise to several calendar task entries, enabling this option can result in a lot of reminders.
Close calendar task entry when Open Task button clicked	When you open a calendar task entry, a Taskline toolbar is displayed and you can click the **Open Task** button to open the associated task. If this option is selected, the calendar task entry is closed as the task is opened. Otherwise, it is left open.
Show list of attachments	This option shows, on the calendar task entry, the names of any attachments on the task.
Open task after 'Create Task' from appointment	You can right click on a standard appointment in Outlook's calendar and click **Create Task** or **Create Task and Pin** from the context menu. This creates a Taskline task from the appointment. Select this check box to have that task opened after the command has run.
Copy contacts from task	Copies the list of Contacts from the task to its calendar task entries. Enabling this option will slow Taskline down slightly.
Copy notes from task (text only)	Copies notes from a task to its calendar task entries. Only the text, excluding formatting, is copied.

Category of calendar task entries

Copy from task	This option tells Taskline to copy a task's **categories** to its calendar task entries.
Always set to	Select this option to have Taskline create all calendar task entries with the same **category**. Leave blank to create calendar task entries with no **category** assigned.

Note

- If calendar task entries are assigned a **category**, then Outlook shows the **category** color, rather than the colors set in Taskline's **Calendar Task Entry Colors** dialog. Thus if you want Outlook to use the **Calendar Task Entry Colors**, you must select the **Always set to** option and leave the edit box blank.

Miscellaneous

Reset "Don't tell me about this again" messages	Selecting this option means that all the messages that no longer appear, because you selected the **Don't tell me about this again** check box, will now be displayed. The **Don't tell me about this again** option will still be available, should you wish to hide them again.
ClearContext project compatibility	By default, Taskline stores the project name assigned to a task in an Outlook User Defined Field called **Project**. However, if the **ClearContext project compatibility** advanced option is selected, Taskline instead uses an Outlook custom field called **CC-TopicName**. This is the name used by the ClearContext® Outlook Add-In and so aids compatibility if you also have that Add-In installed.

Understanding Taskline

If the task reschedule is producing results that are difficult to understand, try selecting one or more of the following options. The first 4 options temporarily remove rules from the reschedule logic, to simplify the process and hopefully make it easier to understand.

Ignore Max time per day	If the reschedule is producing results that are difficult to understand, try this option. It will tell Taskline to ignore the **Max time per day** setting on all tasks, so that you can see what difference this makes. This check box is reset each time you run Taskline – changes are not saved.
Ignore Max time per week	Similar to the previous option, this option tells Taskline to ignore the **Max time per week** setting on all tasks. This check box is reset each time you run Taskline – changes are not saved.
Ignore task split settings and allow tasks to be split without restriction	Tells Taskline to ignore the **minimum split** setting on a task, and also the **default minimum split** setting on the **Options** tab of the main dialog, so that you can see what difference this makes. This check box is reset each time you run Taskline – changes are not saved.
Ignore task constraints	Tells Taskline to ignore **task constraints**, so that you can see what difference this makes. This check box is reset each time you run Taskline – changes are not saved.
Give reasons for tasks not being scheduled	If Taskline is ignoring some tasks and you're not sure why, try selecting this option. It will display a summary of why tasks are not scheduled.

Renumber or Re-letter Priority (A1)

Click the **Renumber or Re-letter Priority (A1)** button on the **Options** tab of the **Taskline** dialog box to display the following options.

Renumber

Only update numbers, leave letters unchanged	Select this option to leave the letter part of **Priority (A1)** unchanged. Only the number part will be updated.
Priority of first task	This option, when used in conjunction with the **Step** field, allows you to renumber the **Priority (A1)** values on all of your Taskline tasks. Enter values for the letter and number values of the priority of the first task in the first two boxes. You can then click the **OK** button to renumber the task priorities. **Tip** • You set the **Priority (A1)** values on a task when you open the task and enter values on the **Taskline** tab of the **Taskline** form.
Step	This option, when used in conjunction with the **Priority of first task** settings, allows you to enter the difference between the **Priority (A1)** values on all of your Taskline tasks. Enter whatever gap you want between consecutive tasks here. For example, if the priority of your first task is B10, and you enter 5 here, your tasks are assigned **Task Priorities** of B10, B15, B20, B25, and so forth. Usually, you should enter a larger **Step** value; later, this allows you to quickly add a new task between existing tasks. Click the **OK** button to renumber the task priorities.

Change letter

Change ___ to ___	This option allows you to change the letter of the **Priority (A1)** values on all of your Taskline tasks to a new letter that you enter. The numeric part of the **Priority (A1)** value is not changed. Enter the letter that you want to change in the first box. In the second box, enter the new letter that should replace it. Click the **OK** button to re-letter the task priorities. **Tip** • You set the **Priority (A1)** values on a task when you open the task and enter values on the **Taskline** tab of the **Taskline** form.

Renumber or re-letter the following task types too

Ignored tasks	Normally, Taskline does not process tasks which have the **Ignore this task** check box set. This check box is on the **Taskline** tab of the task form. However, you can select the **Ignored tasks** check box to have Taskline renumber or re-letter ignored tasks too, which is useful if you have some tasks that are temporarily on hold but you don't want them to get out of sequence during a renumber.
Tasks that are	Normally, Taskline does not process tasks that have their **Status** set to **Deferred** or **Waiting on someone else**. However, you can select this

deferred or waiting on someone else	option to have Taskline renumber or re-letter these tasks too, which is useful if you have some deferred or waiting tasks that you don't wish to get out of sequence during a renumber.

Related Topics

Defining the Order in Which Tasks are Scheduled

Priority (A1) on the Taskline Task Form

Import Tasks

Taskline allows you to take a task list created in a text editor or a word processor, such as Notepad or Word, and create a set of tasks in Outlook from that list. Your list should be one task subject per line. Each line of text will result in the creation of one new task, with the task's subject taken from that line of text.

To import tasks:

1. Select your list in your text editor and copy it to the Windows clipboard.
2. Open the **Import Tasks** dialog. To do this, start Taskline by clicking the **Taskline** toolbar button in Outlook. Then click the **Options** tab, and then the **Import Tasks** button.
3. If the list you have copied to the clipboard was a bulleted or number list, select the **This is a numbered or bulleted list** check box. The bullets or numbers will then be removed, as you won't want these in the task subject. If your list was simple text, leave this check box deselected. The dialog shows the subject of the first task so you can immediately see the effects of selecting the check box.
4. Optionally, select initial values for the **Total work**, **Project** and **Working hours** that will be assigned to each task created. You can of course change these values after the tasks have been created. Note that **Working hours** is only shown if you are using Taskline Professional Edition.
5. Click **OK** to import the tasks. These will be created in the **Schedule the tasks in...** folder you have selected on the **Tasks** tab of the dialog.

Notes

- For very long lines of text, only the first part of the text will be placed in the task subject. In the cases where the task subject is truncated, the whole line of text will be added to the task notes.
- Blank lines will be ignored by the import process.

Help / About Tab

Purchase	Click this button to be taken to the purchase information page of Taskline's web site. This page gives details on Taskline pricing and delivery.
Enter Product Key	This button displays the **Enter Product Key** dialog box, which is where you can enter the registration information sent to you when you purchase Taskline. If your registration email is in Outlook, click the **Auto Process Registration Email** button to have Taskline read the email and fill in the dialog box for you.
Taskline Tutorial	Click this button to display the Taskline tutorial.
Help and Support	Click the button to find out about your options for getting Taskline help and support.
Choose which Taskline version to evaluate	Taskline is available in 2 editions – Standard and Professional. During your evaluation period, you can switch between editions so that you may evaluate each. To change editions, select the appropriate radio button and click **Apply**.

Related Topics

Purchase Taskline

Taskline Dialog Box

Tasks Tab

Projects Tab

Calendar Tab

Working hours Tab

Working Week Tab

Options Tab

Newsletter Articles

Taskline Tip — Comparing How You've Done With How You Thought You'd Do

If you're brave enough to want to compare your actual performance with your scheduled performance, try this. Enable the **Taskline should set Start and Due to the Schedule dates** option, run Taskline, and then turn this option off for subsequent reschedules. You can now compare your original dates (the **Start** and **Due** dates) with your latest estimates (the **Scheduled start** and **Scheduled end** dates), or when you actually started (**Actual start**).

Taskline Tip — Unscheduled Tasks

One of the most common reasons for slipping behind schedule is the failure to adequately plan for unscheduled tasks and interruptions. It's a mistake we even make ourselves. Phone calls, people stopping to talk and the odd 5 minute task that needs your prompt attention all add up. Collectively, if not individually, these items are predictable, so schedule them in. You could do this by adding a recurring appointment, or a day time break to reserve the necessary time, or by simply telling Taskline that your working day is shorter than it actually is. Doing so will increase your job satisfaction and make the dates you give to others more reliable.

Taskline Tip — Printing Schedules

Most people find time management difficult. This is human nature. We prefer doing the things we like and we put off the things we don't like, for example. Having an Outlook printout of your Taskline schedule on your desk really helps to combat these traits by giving you focus. Printing out a calendar, complete with calendar task entries, is particularly useful in this regard. You can then refer to the printout during the day to see what you should be working on and how you're doing.

There are several lesser known Outlook features that can assist when it comes to printing out a schedule:

- Date range. With your Outlook calendar open, click **File** → **Print**. You can then use the **Print Range** settings to say when you want the printout to start and end.
- Setting the font for printing. Click the **Define Styles** button on the **Print** dialog. Click on the style you prefer (I use the **Monthly Style**) and click **Edit**. Here you can change the print font without changing the on-screen font. Arial Narrow is particularly useful for printing.
- On the same dialog, for the **Monthly Style**, it is often useful to clear the **Print Exactly One Month per Page** check box if you are printing out a schedule mid-month.
- You may wish to filter the calendar view before printing. If you wanted a calendar view of just your Taskline tasks for example, you could do this by setting up a filter. Click **View** → **Current View** → **Customize Current View** → **Filter** → **Advanced tab** → **Fields** → **User defined fields in folder** → **@CreatedByTaskline**. Set the condition to **exists**. Outlook 2003 users need to click **View** → **Arrange By** → **Current View** → **Customize Current View** etc.

You could also filter on **label**, **category** or **Show time as** to remove certain types of appointments from your printout.

Taskline Tip — Printing a Whole Online Help Chapter in One Step

With the online help, you can click on a chapter heading in the **Contents** tab (i.e. the lines with the purple closed book icon) to select it. If you then click the **Print** toolbar button, you'll be given an option to **Print the selected heading and all subtopics**.

Thus the whole chapter gets printed out. The pagination isn't great, but it works.

Taskline Tip — Lost Product Key

Should you ever lose your Taskline product key, you can have it automatically resent via our web site. The 2nd entry in the Support FAQ on the site gives full details: www.taskline.com/FAQ.asp#KeyQ

Taskline Tip — A Scheme for Prioritizing and Organizing Tasks

Task prioritization is important in encouraging you to do the most important tasks first. But how do you prioritize your tasks when you have hundreds of them? This is an interesting method devised by Taskline user Aviv Riftin. He is a Project Manager who works in a hectic environment, dealing with 40 different projects and tasks that originate from around 20 different people. He also has to cope with urgent requests from his boss and ends up having almost 50% of his tasks that weren't planned for originally

To cope with this, and to keep the amount of time he spends prioritizing tasks to a minimum, he has agreed a 12 level task categorization scheme with his boss, which is a sort of priority map. For example, a "show stopper" is **A10**, a task related to his boss is **A20** and so on. He recalls that actually setting up these priorities was a useful exercise in itself, because it was a good opportunity to agree with colleagues on how tasks should be prioritized.

Each time a new task arrives, it gets categorized and then given a priority based on that category. Then he immediately runs Taskline, and looks out for warnings about missed constraints. If that happens, he does one of three things:

1. Delay some constraint, if possible.
2. Phones the client to tell them to expect a delay. As he points out, this step is important; clients will usually accept some delay if you tell them about it in advance.
3. Phones his wife to tell her he's going to be working late...

Taskline Tip — An Alternative Scheme for Prioritizing and Organizing Tasks

This is how our support engineer, Charles Sinclair, manages his tasks. Charles has a lot of scheduled work to do, such as authoring our web site and Taskline Q/A work, as well as handling all of our support. He wrote:

Personally, I don't use **Priority (A1)**. I prefer to use **Natural Order** for several reasons:

1. I can only work on one task at any one time and so I like a system that forces me to put tasks into priority order. With **Priority (A1)**, you can give several tasks the same priority, and so continually defer "What shall I do next?" decisions. This can be unproductive if you end up revisiting the same issue several times.
2. I can change the priority of a task visually, by dragging it up or down the task list.
3. You cannot get duplicate priorities. When you change a task's priority, other tasks in effect have their priorities automatically updated to accommodate this.

Of course, if you have 100's of tasks, deciding individual priorities is difficult. To get round this, I just keep roughly 30 to 90 (it varies a lot!) of my most pressing tasks in my **Tasks** folder. The rest I move to a 2nd task folder I call "Future Work". Keeping this split helps me focus on the work in hand and also helps psychologically — staring at a huge task list can be depressing! I keep my "Future Work" list in approximate priority order. When my working task list gets down to about 20 tasks, I move the 30 or so most important tasks from my Future Work folder to my working tasks folder, putting them into the exact order I intend to work on them in the process.

Periodically, when I want to see the big picture, I run Taskline on my Future Work folder. When I do this, I set the **First Task Start At** date to the finish date of the last task on my working task list. This then gives me a good feel for when long term work is likely to be completed.

Task Planning With Taskline — A Recommended Approach

We often get asked about "best practice" with Taskline. Best practice is hard to define as different processes work for different people in different situations, but the following approach should work well for most people.

1. Firstly, working to an unachievable schedule is stressful and disheartening, so take a little time to make sure that your schedule is achievable. Check that:
    a. You haven't left any tasks out
    b. Task Total work values are reasonable
    c. Appointment travel times are reasonable
    d. Task ordering is correct
    e. Any applicable deadlines have been entered
    f. You have left yourself enough free time to manage the inevitable unscheduled interruptions that happen during the day — phone calls, coffee breaks, people walking in for a chat, thinking time (very important) etc. You could do this by making an existing day time break longer than it needs to be, or by entering a day time break specifically for this purpose, or perhaps by setting the **I start work at** and **I stop work at** times conservatively.
2. Run Taskline and visually check that the schedule looks reasonable (i.e. you have not made any mistakes). Then print the schedule off and keep it on your desk as a reference.
3. Try and stick to the schedule. It'll give you focus:
    a. At the start of each day, quickly look at what you're expected to achieve that day.
    b. At the end of each day, take a quick look at what you've got on for tomorrow.
4. Mark tasks off as complete (or part complete if you prefer) when you've done them, to keep the schedule up to date, and to remind yourself that you are making progress!
5. When a new task comes in, give it a priority and a **Total work** value. Then
    a. If it's urgent, rerun Taskline there and then. You may then need to print off an updated schedule.
    b. If it's non-urgent, there's probably no point in running Taskline just yet, as it may rearrange your short term schedule, which you may not want.
6. Eventually, the schedule will get out of shape. At this stage, don't stress yourself out chasing the unachievable. So:
    a. Look at why the schedule got out of shape. Can you make any adjustments to improve the accuracy of the next one?
    b. Rerun Taskline to calculate a new schedule.
    c. If any deadlines are now being missed, or dates promised to others can no longer be achieved, tell them. The earlier you give people notice of delays, the more willing they will be to accept them, not least because it gives them time to adjust too.

7. So, how often will you run Taskline? It depends:
    a. A survey of Taskline users revealed that the average was 6 times per week, but some people (who I guess have tasks coming at them from all angles) run it up to 50 times a week.
    b. If you have a fairly stable schedule, or if you need to try and stick to an agreed schedule, then once a week or less is sufficient.

Outlook Tip — Use Auto Formatting To Differentiate Different Task Types

Outlook has some nice auto-formatting capabilities. You could use these to, for example, highlight tasks that are due this week in bold or show tasks that are ignored by Taskline in gray.

To highlight tasks due this week, open your tasks folder and click **View** → **Current View** → **Customize Current View**. Outlook 2003 users click **View** → **Arrange By** → **Current View** → **Customize Current View**. Click the **Automatic Formatting** button and then click the **Add** button. Give the rule a name (for example, "Due This Week") and then click the **Condition** button. On the **Filter** dialog, click the **Advanced** tab, then the **Field** button and choose the **Forms** entry. On the dialog that appears, make sure **Personal Forms** is selected in the drop down list at the top of the dialog, then add Taskline to the right hand list box and **Close** the dialog. Click the **Field** button again but this time click **Taskline**, which should now be visible in the list, and then click **Scheduled end**. Then simply set the condition to **this week** and click the **Add to List** button. **OK** the Filter dialog to return to the **Automatic Formatting** dialog and then click the **Font** button to select how you wish tasks due this week to be highlighted.

To highlight tasks ignored by Taskline, the procedure is very similar, but you would set up a condition of **Ignore task** equals **Yes** on the Filter dialog.

Outlook Tip — Using Grouping to Edit Many Items in One Go

Outlook allows you to group table views by any field. For example, you may choose to group your tasks by **Project**. This groups together all tasks with the same **project**, under a project heading, and also allows you to collapse or expand the display of individual projects. But a less well known feature of grouping is that it also acts as an edit facility for multiple items. For example, if your task view was grouped by **project**, you can drag and drop tasks between groups to change the **project**. This isn't restricted to one item at a time — you can select as many items as you want and drag them between groups, to change many tasks in one go. This can be used with almost any field on any item. For example, it could be used as a quick way to make many appointments in your calendar **Private**, or to bulk change **categories** on any Outlook item.

How to use grouping in Outlook views is described in Taskline's online help. On the **Contents** tab of the help, navigate to:

Getting the Most out of Outlook Views
→ Customizing the Task Table View
→ Grouping

The Taskline Task Form in Outlook

If you open an Outlook task, the task form for Outlook appears, displaying task information that you can also modify. The standard Outlook task form has two tabs: **Task** and **Details**.

If you open a Taskline task, instead of the standard Outlook task form, the Taskline task form appears. This is identical to the standard task form, except that a new tab is present, the **Taskline** tab. This tab displays all of the information and options useful to task scheduling, such as dates, duration, progress and so on. While most options, such as **Subject** and **Project**, appear on only one tab of the form, a few appear on two tabs, allowing you to enter the information on either.

Tips

- When you create a new task, the standard Outlook **Task** tab is initially displayed. However, when you open an existing task, you can nominate which tab is initially shown by using the **Outlook task form initial tab** drop down list, on the **Options** tab of Taskline's main dialog.
- By default, the Taskline tab is only shown for tasks in your nominated **Schedule the tasks in** Outlook folder, which is set on the **Tasks** tab of Taskline's main dialog. If you want it shown for all tasks, open the **Advanced Options** dialog and select the **Show the Taskline tab for tasks in all Outlook folders** check box.

Dates and duration

Scheduled start	This is the estimated or most likely start date for the task. It is initially clear and is recalculated each time you run Taskline. The Taskline calculation takes into account things like appointments in your calendar, the priorities of your tasks, and any constraints on them. As few people can predict work with 100% accuracy, for example a meeting taking longer than anticipated, you cannot usually start every task exactly on schedule. However, the **Scheduled start** date gives you a very good idea of when you are likely to start working on a task. For a task that is partly completed, **Scheduled start** shows when the remaining part of the task should be started, and **Scheduled end** displays when the task is due to be fully completed. For a completed task, **Scheduled start** shows when the task started, and **Scheduled end** displays when it ended. More about scheduled dates.
Scheduled end	This is the estimated or most likely finish date for the task. It is initially clear and is recalculated each time you run Taskline. The calculation takes the **Scheduled start** date and adds to it the task's **Total Work.** Taskline then adjusts for things like your normal working week, your daily breaks and appointments in your calendar, to derive the most likely end date for your task. You may not finish a task exactly as scheduled, because of unanticipated interruptions or because the task simply took longer than your **Total work** estimate. However, the **Scheduled end** date gives you a very good idea of when you are likely to finish a task. More about scheduled dates
Total work	A task's **Total work** is your estimate of how long a task will take – effectively how much work it entails. More. You can enter the **Total work** as a number of minutes, hours, days or weeks; the abbreviations are m, h, d and w. For example, to set **Total Work** to 5 hours, you can type "5h" or "5 hours".

	When you create a new task, the **Ignore this task** check box is initially selected. This is automatically cleared by Taskline when you set **Total work** to a non-zero value. If you want to create a task with zero **Total work**, to represent a significant milestone or goal in your task list, you must remember to clear the **Ignore this task** check box yourself, since **Total work** is zero in these cases. Outlook will convert large numbers of small time units to larger time units. For example, "120 minutes" converts to 2 hours, and 8 hours converts to 1 day, assuming that there are 8 working hours in the day. See Setting the Working Week for information on how to set the number of working hours in a day.
Progress	
Actual start	This is the date the task actually started. It is set only for a task that is in progress or completed. You don't need to set this field unless you want to – if you leave it blank, Taskline sets it for you. More.
Status	This is the standard Outlook field that is also on the **Task** tab of the task form. Note that Taskline will not schedule tasks whose status is set to **Deferred** or **Waiting on someone else** and such tasks will also have their **Scheduled start**, **Schedule End** and **Week Commencing** fields cleared.
Actual work	**Actual Work** is the amount of time spent on the task to date. This is in contrast to **Total work,** which is how much time you thought you would spend on the whole task. **Actual Work** is optional, but it is often useful to record how your time has been spent. You can also look back at this information when scheduling similar work in the future. When you get part way through a task, you may then realize that your initial estimate is not correct. In this case, you should update **Total work** as well, so that your schedule remains realistic and achievable. You can set either **Actual Work** or **% Complete,** or set both of them, or ignore these fields and set none of them. More. The format of the **Actual Work** field is the same as **Total work** and is a number followed by a time unit, such as "5h" for 5 hours.
% Complete	The percentage of the task that has been completed. If you don't think in terms of percentages, you can enter information in **Actual Work** instead. Both of these fields are optional. More.
Work remaining	This information is display only and you cannot edit it. **Work remaining** shows the amount of work that is still outstanding on the task. More.
Reminder	
Reminder	Click the **Reminder** check box and enter an amount of time to set a reminder on a task. Taskline task reminders use working time, not elapsed time. So, for example, if you wish to be reminded one day in advance about something that starts on Monday, Taskline instructs Outlook to remind you on Friday, assuming that you do not work weekends. Taskline reminders work by setting up the standard Outlook reminder on your behalf. Thus you can't use both types of reminder on the same task at the same time. More.
Scheduling control	
Ignore this task	Select this box to have Taskline completely ignore a task. Setting a task to **Ignore** clears the **Scheduled start**, **Schedule End** and **Week commencing** options. This check box is selected by default. However, when

	you enter information in the **Total work** box, this clears the **Ignore this task** check box, allowing Taskline to schedule the task. Thus, tasks that have zero hours for the **Total work** box are not scheduled unless you unselect the **Ignore this task** check box. You can change the default value for **Ignore this task** on the Advanced Options dialog.
Show as	Use this drop down list to set the **Free/Busy** status of the calendar task entries for this particular task. If it is left blank then the **Show time as** setting on the Calendar tab of Taskline's main dialog is used. The **Show time as** setting is the default value for all tasks; this default can be overridden by using this setting.
Task can be split	Select this option to allow Taskline to divide a task into shorter parts when, during task scheduling, it encounters fixed items such as calendar appointments and day time breaks. This makes optimum use of your available time. Clear this check box if you want the whole task to be scheduled as one contiguous item, assuming a sufficiently long time slot is available. More about task splitting.
Project	Use the **Project** control to optionally enter the name of a project that the task belongs to. Giving a task a project name is useful for grouping together related tasks. You can type a new project name into the box, or click on the down arrow to select an existing project name that you have used before. With Projects, you now have a second way of categorizing tasks, in addition to the standard Outlook method of Categories. A Project describes a related set of tasks, for example all the work for one particular customer or a description of a significant collection of work, such as an office relocation. Categories on the other hand refer to the type of work, such as administration, report writing, meetings etc. As a guide, categories tend to be fixed, while projects tend to change over time. After a while, you may find that the **Project** list contains previously used project names that you do not intend to use again. In this case, you can remove these old names from the list by clicking the **Projects** tab of the Taskline dialog. More about projects.
Minimum split	This option is only available if the **Task can be split** option is selected. It specifies the shortest part that Taskline may split a task into. For example, if you enter 30 m for 30 minutes, then if Taskline needs to split the task, each part will be 30 minutes or greater in duration. You can set a default minimum split for all tasks by using the **Default minimum task split** option on the **Options** tab of the Taskline dialog. More. The **Default minimum task split** is only used when **Minimum split** is set to zero on the task form. More about task splitting.
Working hours	Taskline Professional Edition only. Set the **Working hours** to tell Taskline which hours are applicable to this task. You can type the name of the **working hours** in, or select it from the drop down list. But you must first define your **working hours**, using the **Working Hours** tab of Taskline's dialog. How? If no hours are assigned to a task, then the default hours are used. You set which **working hours** are the default ones by selecting the **Default hours** radio button on the **Working hours** tab of Taskline's dialog. Sometimes you may want tasks of a certain **project** or **category** to always have the same **working hours** assigned. For example, you may want tasks

	of **category** "Personal" to be scheduled for weekends. If you give the **Working hours** exactly the same name as a **Project** or **Category**, Taskline will automatically assign the **Working hours** for you. Specifically, if the **Working hours** are currently unset, then: 1. If some **working hours** exist that have the same name as an assigned **category**, then those hours are automatically assigned. 2. Or, if some **working hours** exist that have the same name as the assigned **project**, then those hours are automatically used.
Priority (A1)	Enter a **Priority (A1)** value. A valid **Priority (A1)** must consist of at least one letter, A-Z, followed by an optional number ranging from 0 to 99. Examples of valid **Priority (A1)** values are B, A05 and X40. **Priority (A1)** is one of the ways of ordering your tasks. More about task ordering. It is usually advantageous to leave gaps between the task priorities of consecutive tasks, so that you may later give another task a priority between existing ones, without having to reprioritize existing tasks. For example, you might wish to give the first task you want to work on task priority A10, the second one task priority A20, and so on. **Priority (A1)** is like the Outlook **Priority** option, except that **Priority** lets you use only three values: **Low**, **Normal**, and **High**. You can reassign **Priority (A1)** values by clicking the **Renumber or Re-letter Priority (A1)** button on the **Options** tab of Taskline's main dialog. More. There is no need for the logic links used in Project Management software – Taskline uses task ordering to achieve a similar result.
Max time per day	**Max time per day** is used to limit the amount of time allocated to a task each day. It can be used to spread a longer task out over several days or weeks, for example to divide your time between 2 or more tasks, rather than working on a single task exclusively until it's completed.
Max time per week	**Max time per week** is used to limit how much time is allocated each week to a long task.

External constraint

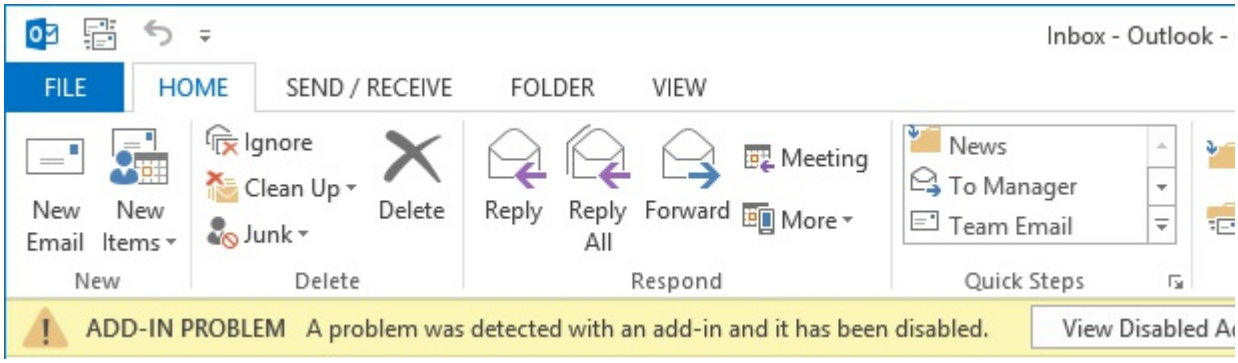
Task should	Usually you need only tell Taskline in which order to schedule your tasks. You do this by using the **Order by** settings on the **Tasks** tab of the **Taskline** dialog. **Priority (A1)** or **Natural Order** are both common choices for task ordering. More. Sometimes however, external constraints come into play, such as deadlines, or perhaps you are waiting on a delivery before you can start work on a task. For such tasks, select a constraint from the **Task should** dropdown list. For example, **Finish on or before** constraints work well with deadlines. More. Once you've entered a constraint, you will need to enter a date for that constraint. When is the deadline, or when is that delivery due? You do this by entering a date to the right of the calendar icon or by clicking on the dropdown list to display the **Date picker** and clicking a date on that. If you need to be accurate, you can also enter a time for the constraint. **Important**

	• Task constraints should be the exception, not the norm. Most of your tasks should be unconstrained and only those with deadlines or other external date issues should have constraints. If you place constraints on most of your tasks, then you are effectively manually scheduling and therefore stopping Taskline was working effectively.
Select any other tasks also affected by this constraint	For tasks with a constraint, you can optionally tell Taskline that other tasks are also affected by that constraint. For example, you might have a package of work that consists of three tasks, and none of them can start until someone else gives you a report they're writing. In this case, you would: 1. Set a **Start on** or a **Start on or After** constraint on the first task you wish to work on. 2. Check the **Select any other tasks also affected by this constraint** check box. 3. Select the other two tasks from the list by clicking on them. To deselect a task, click it again. The following types of tasks cannot be made dependent upon other tasks and hence will not be displayed in the **Select any other tasks also affected by this constraint** list: ▪ **Completed** tasks. ▪ **Recurring** tasks, because these are already constrained to happen on a certain day and you can't have two constraints on one task. ▪ **Delegated** tasks, because someone else is doing them. ▪ Tasks with their **Status** set to **Deferred** or **Waiting on someone else**, because these are effectively on hold and hence Taskline ignores them. ▪ Tasks with the **Ignore** check box checked. These are, by definition, ignored by Taskline. ▪ Tasks with **constraints**, again because you can't have two constraints on one task. Do not try to use the **Select any other tasks also affected by this constraint** list to set task order. You should use **Order by** for that. How? This dependency list is only used when a constraint applies to more than one task.
Show projects	You may have tasks with the same subject but in different projects. For example, each of your projects may have a "Produce final project report" task. To differentiate different tasks with the same subject, select the **Show projects** check box. This will prefix the project name to the task subject in the **Select any other tasks also affected by this constraint** list box.

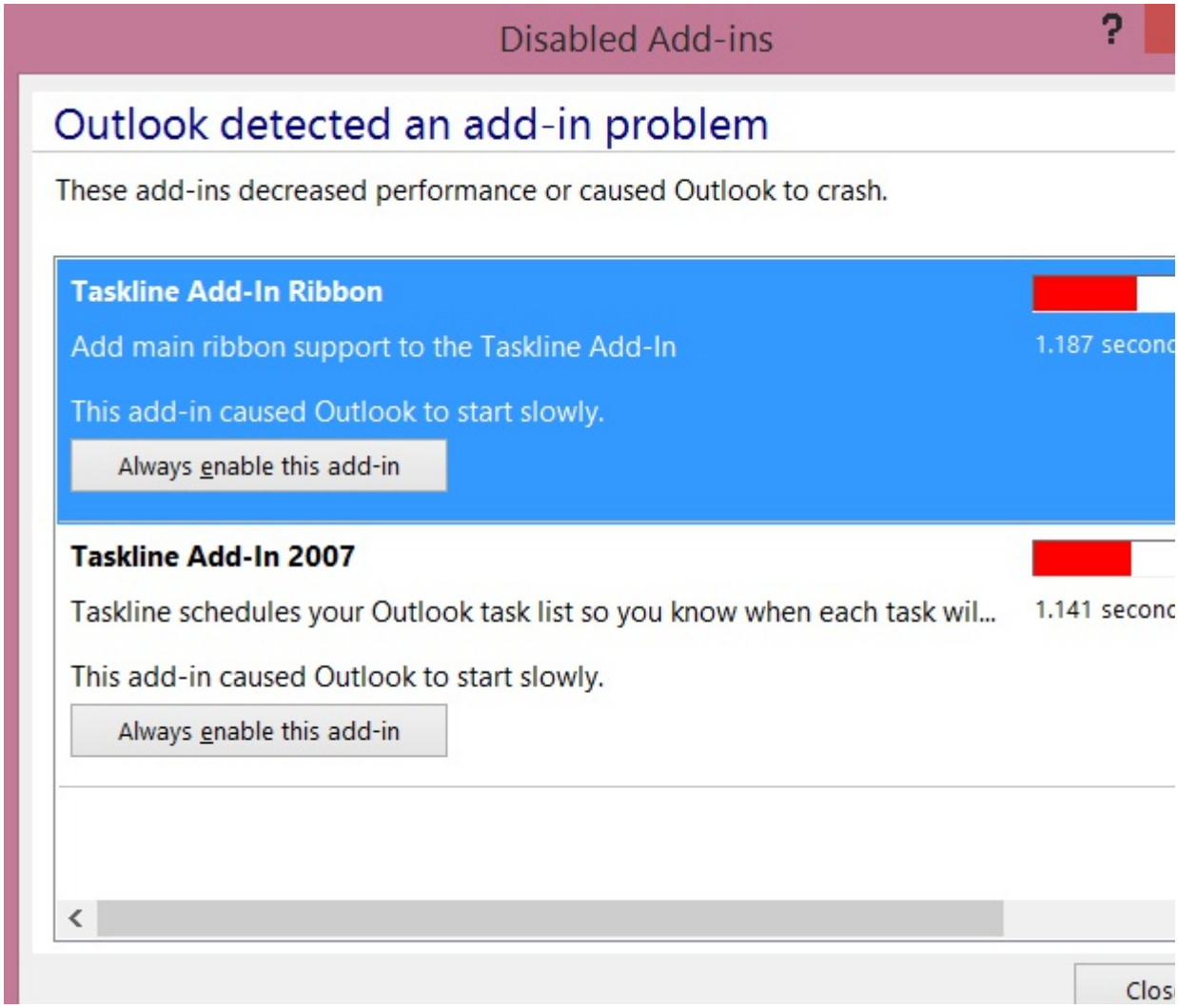
Taskline Outlook Add-In is Not Responding

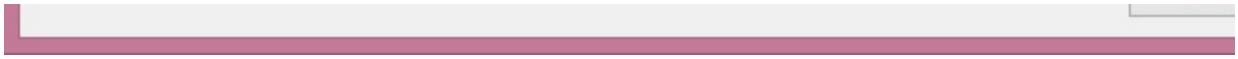
Outlook 2013 has some built-in target start up times for Outlook Add-Ins that even skeleton Add-Ins produced by Microsoft's own Visual Studio Add-In wizard cannot meet. Consequently, both of Taskline's Outlook Add-Ins often get disabled by Outlook 2013. This stops Taskline from working and you must permanently enable Taskline's Add-Ins to continue using Taskline.

When you start up Outlook 2013, you may see **ADD-IN PROBLEM** just below the main window's ribbon:



To fix this, click the **View Disabled Add-ins** button or click the **FILE** tab and then the **Manage Add-ins** button. This will display the **Disabled Add-ins** dialog:


Disabled Add-ins
Outlook detected an add-in problem
These add-ins decreased performance or caused Outlook to crash.
Taskline Add-In Ribbon
Add main ribbon support to the Taskline Add-In
1.187 second
This add-in caused Outlook to start slowly.
Always enable this add-in
Taskline Add-In 2007
Taskline schedules your Outlook task list so you know when each task wil...
1.141 second
This add-in caused Outlook to start slowly.
Always enable this add-in
Clos



Click the **Always enable this add-in** buttons for both Taskline's Add-Ins.

Outlook VBA Code and Taskline

Accessing Taskline Custom Task Properties (User Defined Fields)

To access Taskline's custom task properties, use:

```
Task.UserProperties("Name of Property")
```

For example, to assign to the **Priority (A1)** property, use:

```
Task.UserProperties("A1") = "B25"
```

A full list of Taskline custom properties is available at Fields Specific to Taskline Tasks

Example Code

The following example creates a new Taskline task. It then assigns values to various standard and Taskline-specific task properties.

```
Private Sub CreateTasklineTask()
Dim Task As TaskItem
Set Task = CreateItem(olTaskItem)
' Task.Display causes Taskline's Add-In to add all the Taskline User Defi
'  Fields to a new task. It can be omitted for existing tasks.
Task.Display
With Task
    .Subject = "Example Taskline Task"
    .TotalWork = 60 ' This is 60 minutes
    With .UserProperties
        .Item("A1") = "B25"
        .Item("Working hours") = "24/7"
    End With
    .Close (olSave)
End With
End Sub
```

Related Topics

Fields Specific to Taskline Tasks

Purchase Taskline

Taskline is available free of charge for 10 days of usage. After this period, you must buy the product if you wish to continue to use it. When you decide to buy, you immediately receive a temporary Product Key, which allows you to continue use Taskline for a further 30 days. Then, approximately two weeks after purchase, you will receive a personalized and permanent product key, which will allow you to use Taskline indefinitely.

Your purchase is risk free, because it comes with a 30-day, unconditional, money-back guarantee. We are confident that you will find Taskline to be an invaluable product that will quickly pay for itself in terms of improved control, organization and productivity.

Pricing

The single license price for Taskline v4 Standard Edition is US$39.95, €35.95 or £24.95, while Taskline v4 Professional Edition is priced at US$79.95, €69.95 or £49.95. Existing users of Taskline v3 or earlier can upgrade to version 4 at substantial discount. Discounts are also available for multiple licenses and educational use.

These prices may change however. Please visit www.taskline.com/buy.aspx for an up-to-date quotation in your local currency.

How to Order

We accept company purchase orders, most credit and debit cards as well as payment by PayPal. To order online, please visit our secure payment facility at www.taskline.com/buy.aspx.

Full terms and conditions for purchase order acceptance are also set out on www.taskline.com/buy.aspx

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Office Hours, Monday to Friday

UK Time	10am to 5:00pm
Central European Time	11:00 to 18:00
Eastern Time	5am to 12:00pm
Pacific Time	2am to 9:00am

What's New

For the latest What's New? information, please visit www.taskline.com/whatsNew.asp

Taskline Version 4.1 December, 2014

New Features Specific to Outlook 2013

- The Calendar Task Entry context (right click) menu now works on Outlook 2013 too. Commands available are **Open Task**, **Complete**, **Whole Task is Complete** and **Pin/Unpin**.
- You can set **Show time as** for calendar task entries to **Working Elsewhere**.
- There is a new **Advanced Option** – **Ignore 'Working Elsewhere'** appointments.

New Features for all Versions

- There are 2 new right click menu options for standard Outlook appointments: **Create Task** and **Create Task and Pin**. These enable you to do some planning in the calendar and then easily convert appointments into Taskline tasks. The appointment is itself converted into a Taskline calendar task entry, like those created by Taskline when it runs.
- There is a new **Create Task** right click menu option for Outlook emails, notes and contacts. This creates a new task from the item, leaving the original Outlook item unchanged.
- Pinned calendar task entries that are **Not Started** and have an **End** date on or before the **First task starts at** date (i.e. those pinned items that are in the past) are now automatically unpinned and rescheduled.
- The **Taskline** section of the ribbon in Outlook has a new button to display Taskline's online help.
- Outlook **Label** names have been removed, only **Label** colors are now shown and the word **Label** has been replaced by **Color**. This gives a cleaner and simpler interface.
- Calendar task entry colors and subjects now update when you click **Apply** – there's no longer a need to reschedule to have them updated.
- You can now have up to 9 day time breaks, up from the 4 previously supported.
- There is a new **ClearContext project compatibility** advanced option. If enabled, Taskline reads and writes task **Project** information from and to the Outlook **CC-TopicName** custom field, instead of the usual **Project** UDF.

Tasks in the Calendar Can Now be Colored Based on New Task Attributes

- **Overdue** so you can color overdue tasks differently.
- **Pinned** so you can color pinned and unpinned tasks differently.
- **Priority (A1)** letter, so for example **A** tasks can be colored differently to **B** tasks.
- There is a new color type on the **Define Colors** (formally Define Labels) dialog such that you can now prevent the creation of calendar task entries for tasks with certain attributes.

The Following Bugs Have Also Been Fixed

- If a task subject contained non-European characters, the subjects for the corresponding calendar task entries were being replaced by question marks. Now fixed.

Taskline Version 4 — March, 2014

Product Requirements and Compatibility

- Taskline now requires Outlook 2007 or above.
- Taskline is now compatible with both the 32-bit and 64-bit versions of Outlook 2010 and 2013.
- Taskline no longer uses a custom Outlook task form. Instead, an Outlook form region is used. This should eliminate most conflicts with other Outlook Add-Ins.

Task Scheduling

- There is a new **Work Between** constraint type, which allows you to specify 2 dates between which a task must be carried out.
- You can now edit Taskline-created task entries in the calendar and **pin** these so that they survive a Taskline reschedule. So you can use Taskline to automatically schedule your tasks and then tweak those results manually. Pinned entries do not get deleted and recreated during a Taskline reschedule, rather they stay put. Moving a calendar task entry will automatically pin it.
- For Taskline Professional Edition only, there is a new **Max time per day** setting. This is used to limit the amount of time allocated to a task each day. It can be used to spread a longer task out over several days or weeks, for example to divide your time between 2 or more tasks, rather than working on a single task exclusively until it's completed.
- For Taskline Professional Edition only, there is a new **Max time per week** setting. This is used to limit how much time is allocated each week to a long task.

Miscellaneous Changes

- You can now limit how many days in the calendar, after the **First task starts at** date, display scheduled tasks.

User Interface Changes

- The Taskline toolbar button is replaced by ribbon controls on Outlook 2010 and above. The ribbon has a new **Reschedule** button which runs Taskline immediately, without showing the dialog first.
- Ribbon support is added for calendar task entries.
- For Outlook 2007 and 2010 only, context (right click) menu support for calendar task entries is also added. This has 4 menu items – **Open Task**, **Complete** and new **Whole Task Is Complete** and **Pin** features.

Taskline Standard Edition

- Taskline Standard Edition now supports the same **labels** functionality as Professional Edition; different **labels** (colors) can be assigned to different types of

tasks.

What Was New in Previous Taskline Versions

Taskline Editions

Taskline is available is 2 editions – Standard and Professional. Both Taskline editions have powerful features that enable you to automatically schedule your future work. However, Taskline Professional Edition offers extra task scheduling power and flexibility:

- Multiple named sets of **working hours** can be defined and different tasks can be scheduled to different **working hours**. For example, work tasks can be scheduled Monday to Friday during the day, and personal tasks can be scheduled for evenings and weekends.
- You can instruct Taskline to ignore all tasks which have been assigned particular **working hours**.
- Different days of the week can have different **working hours**. Taskline Standard Edition follows Outlook's model of having a single start work time and stop work time for all working days.
- Working 24 hours a day is supported in Professional Edition. If the **To** time of a break or the **Stop work** time is 0:00, this is taken as 24:00. With Standard Edition, you must work at least one minute in the day. Again, this follows Outlook's model.
- Up to 9 **day time breaks** can be defined. Standard Edition supports 3 breaks.
- Taskline allows travel time to be defined for appointments, so that tasks will not be scheduled during this time. Additionally, Professional Edition allows you to override this travel time on a per-appointment basis.
- Taskline Professional Edition adds **Max time per day** and **Max time per week** scheduling settings to a task. These can be used to spread a longer task out over several days or weeks, rather than working on a task exclusively until it is completed.

Related Topics

Purchase Taskline

Setting Your Working hours

Using Different Working hours for Different Tasks

Preparation and Travel Time on Appointments

Recurring Tasks and Working on a Task for Only Part of the Day or Week

Frequently Asked Questions

If your question is not answered here, please consult the Taskline web site www.taskline.com/FAQ.asp for the latest version of this FAQ.

Ordering

- What if I lose my Product Key?
- What if I lose my copy of Taskline?
- Will I be sent a boxed product?
- I have both desktop and laptop computers. Do I need to buy 2 licenses if I want to install Taskline on both computers?
- Do you give discounts for educational use?

About Taskline

- Is a PDF version of the help file available?
- Where can I download the current or a previous version of Taskline?
- If I install Taskline, will anything else get installed as well?
- Is Taskline suitable for planning the work of a team?
- What is your upgrade policy?
- How can I report a bug?

Requirements and Compatibility

- What are the system requirements for Taskline?
- What version of Outlook does Taskline require?
- Does Taskline work with Microsoft Exchange Server?
- Will Taskline work with Outlook® Express?
- Is there a version of Taskline for the Mac?

Taskline and the Getting Things Done Outlook Add-In

- Is Taskline compatible with Netcentrics' Getting Things Done Outlook Addin?
- Do you have any recommendations on how Taskline and GTD can work together?

Task Scheduling

- Nothing changes when I run Taskline. Why?
- Why are there gaps of unused time in my schedule?
- I am ordering my tasks by Natural Order, but they are getting scheduling in a completely different order. Why?
- Why are some tasks not scheduled in the order I specified?
- I have set a Due date on a task, but Taskline is ignoring this. Why?
- How do I define task order?
- How can I override Taskline’s normal scheduling and schedule a task for exactly when I want to do it?
- I don't understand why Taskline schedules some tasks the way it does.

- Can I have my tasks automatically scheduled on a regular basis?

Calendar Issues

- I want to see my tasks in Outlook's calendar, but when I run Taskline, nothing appears. Why?
- The Week and the Month calendar views in Outlook show the appointment times twice. How can I stop this?
- Taskline seems to ignore some appointments in my calendar. This results in tasks being scheduled at times that clash with these appointments. Why does this happen?

Using Outlook with Taskline

- I want to schedule my tasks in Natural Order, but in Outlook, when I try to drag tasks up or down the task list to change the order, nothing happens. Why?
- What if I want to track my tasks in a separate spreadsheet or other software?
- I want to export Taskline task information to another program. However, Outlook does not let me access the Taskline custom fields.

Miscellaneous Issues

- Nothing happens when you click the Taskline button on Outlook's toolbar, or the Taskline buttons are missing from Outlook's Ribbon, or you get the message "Taskline's Outlook Add-In is not responding" when you start Taskline.
- You get strange errors with Taskline or Taskline Setup, for example User Defined Field (UDF) errors.

Ordering

What if I lose my Product Key?

No problem. Just click here to visit our Resend Product Key web page and have your registration information automatically resent.

What if I lose my copy of Taskline?

Just download another copy from our web site. All versions will always be available for download.

Will I be sent a boxed product?

No. Taskline is downloaded from our web site. We have a policy of continuous product improvement and easy access to downloadable product updates makes this possible. It also keeps the software price down by removing packaging and shipping costs.

I have both desktop and laptop computers. Do I need to buy 2 licenses if I want to install Taskline on both computers?

With a single Taskline license you may install Taskline on up to three computers, provided that Taskline is used exclusively by you. So, in this circumstance, you need only buy one license.

Do you give discounts for educational use?

Yes. Discounts are available for students and teachers of legitimate educational institutions. Please click here for further information.

About Taskline

Is a PDF version of the help file available?

Full online help is included with Taskline. However, if you prefer the user guide in a PDF format, you can download it here:

- Letter sized paper
- A4 sized paper

Where can I download the current or a previous version of Taskline?

Please click here to access our download page.

If I install Taskline, will anything else get installed as well?

Absolutely not. Our Setup program installs Taskline and nothing else. There is absolutely no adware, spyware, or anything else of that nature.

Is Taskline suitable for planning the work of a team?

Taskline is designed to help one person plan and manage their own work. It is not suited to one person planning the work of several others. In a team environment, each person would plan their own work using Taskline, perhaps keeping tasks in a central or shared location, such as on Microsoft Exchange Server.

What is your upgrade policy?

We are committed to continuously improving Taskline and intend to produce regular upgrades. Upgrades are priced at around 40% of the purchase price. Upgrades are free if you have purchased Taskline within three months of an upgrade release.

We also produce regular minor updates to fix any bugs and keep the current version up to date. These updates are free.

How can I report a bug?

We are very keen to fix any problems you may find with our software. If you find a bug, we ask that you tell us about it, so that we may fix it. To report a bug, please click on the **Help and Support** button on the **Help / About** tab of Taskline's main dialog. Then choose the **Report a Bug** option and click **OK**.

Requirements and Compatibility

What are the system requirements for Taskline?

System requirements are detailed at the end of the Product Details page.

What version of Outlook does Taskline require?

Taskline Version 4 requires Microsoft® Outlook® 2007 or the 32-bit or 64-bit versions of Outlook 2010 or 2013. Taskline Version 3 works with Outlook 2000, 2002, 2003 and 2007.

Does Taskline work with Microsoft Exchange Server?

Yes, Taskline works well when Outlook is connected to Microsoft Exchange Server. But please note that Taskline has not been tested with non-Microsoft Exchange Server replacements, such as HP Open Mail or SUSE OpenExchange Server. We recommend that you do not install Taskline if you are using a non-Microsoft exchange server.

Will Taskline work with Outlook® Express?

No. Taskline requires Outlook. Outlook Express does not support tasks.

Is there a version of Taskline for the Mac?

No, sorry. Taskline requires Microsoft Windows.

Taskline and the Getting Things Done Outlook Add-In

Is Taskline compatible with Netcentrics' Getting Things Done Outlook Addin?

Yes, Taskline is compatible with GTD.Click here to find out more about how these two great tools can work together to manage your workload and save you time.

Do you have any recommendations on how Taskline and GTD can work together?

Yes. Please click here for details.

Task Scheduling

Nothing changes when I run Taskline. Why?

Check that you are scheduling the folder that contains your tasks. Be especially careful if you have several folders with the same name. The tasks folder that Taskline will schedule is shown on the **Schedule the tasks in...** setting, which is on the **Tasks** tab of Taskline's main dialog.

If you are using more than one Outlook Data Store (e.g. PST file), check that you haven't selected task and/or calendar folders in the wrong data store.

Why are there gaps of unused time in my schedule?

- Do you have any **All day events** in your calendar? Taskline will not schedule work on days that have **All day events** on them, unless they have **Show time as** set to **Free**.
- Do you have a filtered calendar view? Are you sure that you can see all of your appointments? Taskline won't schedule tasks where there are appointments already occupying that time.
- Check your **Task can be split** and **Minimum split** settings. Perhaps the gaps in your schedule are too small to be utilized? For example, a 3 hour task that cannot be split will not be able to use any part of a free 2 hours time slot. The **Default minimum task split** setting, on the **Options** tab of Taskline's dialog, also plays a role here. You can check whether the task split settings are resulting in unexpected gaps by telling Taskline to temporarily ignore these settings. To do this, click the **Advanced Options** button on the **Options** tab of Taskline's dialog. Then select the **Ignore task split settings and allow tasks to be split without restriction** check box.
- Gaps can also be caused by travel time on appointments. Check the **Default time allowances before and after an appointment** settings, which are on the **Calendar** tab of Taskline's dialog. Also check, for Taskline Professional Edition, whether any individual appointments have overridden these settings using the " {30m/1h}" style on the appointment subject.
- Check task constraints. **Start on**, **Start on or after**, **Finish on** and **Work between** constraints can stop tasks being scheduled earlier than would otherwise be possible and hence can force gaps into schedules. You can check whether task constraints are resulting in unexpected gaps by telling Taskline to temporarily ignore them. To do this, click the **Advanced Options** button on the **Options** tab of Taskline's dialog. Then select the **Ignore task constraints** check box.

I am ordering my tasks by Natural Order, but they are getting scheduling in a completely different order. Why?

- Check that you have **Order by** set to **Natural Order *Descending***.

- Check that you can drag tasks up and down Outlook's task list using the mouse. If you can't, then your tasks are not in Natural Order.
- Are you looking at the Outlook Tasks folder selected in Taskline, or are you looking at Outlook's **To-Do list**? The **To-Do list** uses a different Natural Order to the Tasks folder. Taskline's Natural Order does not work with the **To-Do list**. You have to use Natural Order in your Outlook Tasks folder. The **To-Do list** contains tasks and emails from all your Outlook folders, whereas Taskline only schedules tasks in whatever folder you have selected on the Tasks tab of Taskline's main dialog.
- It's possible that your Outlook view is corrupt. Try creating a new one. How to do this is documented in Taskline's online help. See Getting the Most out of Outlook Views.

Why are some tasks not scheduled in the order I specified?

Tasks do sometimes get scheduled out of order. There are several reasons for this:

1. Firstly, check that you are looking at the Outlook Tasks folder selected in Taskline. Taskline does not support Outlook's To-Do Bar, which uses a different ordering system to the Tasks folder.
2. Task constraints, such as a **Finish on** constraint, override task order, but only if this is necessary to make sure that the constraint is met.
3. A task with a missed constraint, or a recurring task that has missed its recurrence date, is regarded by Taskline as overdue. Overdue tasks take priority over all others.
4. Different tasks assigned different **Working hours** can get scheduled out of order.
5. If you have turned off **Task can be split** or if you have set **Minimum split** on a task, then it's possible that a higher priority task isn't able to use the first available free time slot, because it's too small. Thus the task will get scheduled in a later time slot, leaving the earlier one free for another (perhaps lower priority) task.

I have set a Due date on a task, but Taskline is ignoring this. Why?

Taskline doesn't actually take a task's **Due** date into account when scheduling, mainly because many people prefer Taskline to actually set the **Due** date when it runs. However, you can certainly specify a date that the task must finish on or by, for example to meet a deadline. You do this by setting up an external constraint, which is simply a matter of selecting the **Finish on or Before** constraint type from the **Task should** drop down list on the Taskline task form in Outlook.

How do I define task order?

To define task order, you should not use constraints, such as a **Finish on or before** constraint. Rather, on the **Tasks** tab of Taskline's dialog, there is the section entitled **Schedule tasks in the following order** . That is how to define task order. Whatever method you choose, you then set the corresponding information on the task appropriately. Most people use **Priority (A1)** or **Natural Order**. It is then just a matter of setting the appropriate **Priority (A1)** value on a task, or dragging tasks up and down the task list to set their **Natural Order**. Things like **Finish on or before** constraints only come into play if you have a deadline to meet. And, even if you have a deadline, you only need to select other tasks if the deadline applies to several tasks, not just one.

For further information on task ordering, please see Defining the Order in Which Tasks are Scheduled.

How can I override Taskline's normal scheduling and schedule a task for exactly when I want to do it?

You can place a constraint on a task to have it scheduled to a specific date and time. On the **Taskline** tab of the task form in Outlook, **External constraint** section, set **Task**

should to **Start on** or **Finish on**. Then enter a date to the right. If you want to lock down the task to the exact minute, enter a time too. You can also use constraints for deadlines – a **Finish on or before** is generally ideal for this.

I don't understand why Taskline schedules some tasks the way it does.

If the task reschedule is producing results that you don't understand, try selecting one or more of the **Understanding Taskline** options, which are on the **Advanced Options** dialog.

Can I have my tasks automatically scheduled on a regular basis?

Yes, you can set up the Windows® task scheduler to do this for you. See Background Task Scheduling for more information.

Calendar Issues

I want to see my tasks in Outlook's calendar, but when I run Taskline, nothing appears. Why?

- On the **Calendar** tab of Taskline's main dialog, **Task entries in the calendar** section, check that you have selected the **Create for tasks that are Not Started or In Progress** option.
- Check that the folder chosen to contain calendar task entries is the one you think it is. This is the **Write task entries to** option on the **Calendar** tab of Taskline's main dialog. Be especially careful if you have several calendar folders with the same name.
- If you are using more than one Outlook Data Store (e.g. PST file), check that task entries aren't being written to a calendar folder in the wrong data store.
- Calendar task entries are not created for tasks with a Total Work of zero unless you have the **Create all day events for milestones** option enabled on the **Calendar** tab of the Taskline dialog. Total Work is your best guess at how long you think each task will take. If it is set to 0, the task is called a milestone, and it will start and end at the same time. Milestones represent significant events, or goals, in your task list.
- It is possible that the task has been created in the calendar, but at a date you did not expect. To check, open the task in Outlook. Go to the **Taskline** tab of the task form in Outlook and note the **Scheduled start** date. Now check the calendar at this date to see if the Taskline created calendar task entry exists.

The Week and the Month calendar views in Outlook show the appointment times twice. How can I stop this?

The problem is that both Outlook and Taskline are showing the appointment time. To stop Taskline displaying appointment times, start up Taskline and go to the **Calendar** tab of the Taskline dialog. Click the **Define Subject** button to show the **Calendar Task Entry Subject** dialog. Locate the text box entitled **Subject for outstanding entry** and delete the text **"<StartEndTime>"**. Repeat for the other three boxes and OK the dialog.

See Defining the Subject of Task Entries if you would like more information on **<StartEndTime>** and other tokens.

Taskline seems to ignore some appointments in my calendar. This results in tasks being scheduled at times that clash with these appointments. Why does this happen?

Taskline ignores any appointment that has **Show time as** set to **Free**. By default Outlook sets up **all day event** appointments as free time. To change this, double click on the appointment in Outlook to open the appointment form. Then change the **Show time as** drop down list to be **Tentative**, **Busy** or **Out of Office**.

You can also instruct Taskline to ignore appointments with **Show time as** set to **Out of Office**. This setting is on Taskline's **Advanced Options** dialog.

Using Outlook with Taskline

I want to schedule my tasks in Natural Order, but in Outlook, when I try to drag tasks up or down the task list to change the order, nothing happens. Why?

To display tasks in their **natural order** in Outlook:

- Outlook 2007 – Click **View** → **Current View** → **Customize Current View** menu option, then use the **Sort** and **Group By** buttons on the **View Summary** dialog box to set the **Sort Items by** and **Group items by** fields to **none**.
- Outlook 2010 and 2013 – Click **View** (Outlook 2013 **VIEW**) ribbon → **View Settings** button to display the **Advanced View Settings** dialog. Then use the **Sort** and **Group By** buttons on this dialog to set the **Sort Items by** and **Group items by** fields to **none**.

Having your tasks displayed in **natural order** and scheduled in descending natural order is often the most convenient way of working, because the order you see your tasks in is the order that Taskline will schedule them in. It's also easy to change this order by dragging the tasks up and down the task list.

What if I want to track my tasks in a separate spreadsheet or other software?

Outlook allows you to export your tasks to a comma separated values file. In Outlook, click **File** menu → **Options** → **Advanced** tab → **Export** button. To export the Taskline custom fields, see the FAQ entry below.

I want to export Taskline task information to another program. However, Outlook does not let me access the Taskline custom fields.

Outlook does not support the export of custom fields. However, you can get round this to a large extent by creating a task table view showing the fields you wish to export, selecting the tasks you wish to export, and then right clicking and selecting **Copy**. The task table view is then copied to the clipboard as tab separated text which can, for example, be pasted straight into Excel.

See Getting the Most out of Outlook Views for instructions on customizing the Outlook task table view.

Miscellaneous Issues

Nothing happens when you click the Taskline button on Outlook's toolbar, or the Taskline buttons are missing from Outlook's Ribbon, or you get the message "Taskline's Outlook Add-In is not responding" when you start Taskline.

It's possible that one or both of Taskline's Add-Ins have been disabled somehow. If so, re-enable them:

If you are using Outlook 2007:

- Outlook, click **Tools** menu → **Trust Center**.
- Click **Add-ins** in the left hand list on the **Trust Centre** dialog.
- On the **Manage** drop down list near the bottom of the dialog, select **Disabled Items** then click **Go**.
- Select **Taskline Add-In 2007** and click **Enable**.
- Click **Close**.
- **OK** the Trust Center dialog.

If you are using Outlook 2010 or 2013:

- Click **File** (Outlook 2013: **FILE**) ribbon → **Options**.
- Select the **Add-Ins** tab.

- In the **Manage** drop down list, select **Disabled Items** and click **Go**.
- If any of Taskline's Add-Ins are listed, re-enable them. Then **Close** the **Disabled Items** dialog.
- In the **Manage** drop down list, select **COM Add-Ins** and click **Go**.
- Select the check boxes for both **Taskline Add-In 2007** and **Taskline Add-In Ribbon**.
- Click OK to close the **COM Add-Ins** dialog.

There are additional issues on Outlook 2013. Please see Taskline Outlook Add-In is Not Responding for full information.

You get strange errors with Taskline or Taskline Setup, for example User Defined Field (UDF) errors.

A conflict with another Outlook Add-In or some data corruption within Outlook is possible.

First, try temporarily disabling other Outlook add-ins:

For Outlook 2007:

- Click **Tools** menu → **Trust Center**.
- On the **Trust Center** dialog, click **Add-ins** to list the installed Add-ins.
- Select **COM Add-ins** from the **Manage** drop down list at the bottom of the dialog and click the **Go** button. You will then be presented with the **COM Add-ins** dialog.
- Write down which items are checked and which are unchecked, then uncheck all non-Microsoft Add-ins and click **OK**. This will temporarily disable them.
- Then go back into the **Trust Center** and again display the list of Add-ins. This time select **Exchange Client Extensions** from the **Manage** drop down list and click **Go**. On the **Add-In Manager** dialog, again note down which items are checked, then uncheck all non-Microsoft items and click **OK**.
- Now shut down Outlook and retry Taskline Setup.
- Finally, go back into the **Add-In Manager** dialog and put things back how you found them.

For Outlook 2010 or 2013:

- Click **File** (Outlook 2013: **FILE**) ribbon → **Options**.
- Select the **Add-Ins** tab.
- In the **Manage** drop down list, select **COM Add-Ins** and click **Go**.
- Write down which items are checked and which are unchecked, then uncheck all non-Microsoft Add-ins and click **OK**. This will temporarily disable them.
- Now shut down Outlook and retry Taskline Setup.
- Finally, go back into the **Add-Ins** tab and **COM Add-Ins** dialog and put things back how you found them.

If disabling Add-Ins does not help, repair any possible data corruption:

Are you using a local PST (Personal Folders) file, or are your tasks on Exchange Server? If your Outlook data is on a server, Outlook will create a local OST file, which can sometimes get corrupted. We can get Outlook to recreate this file. First, locate the OST file:

- In Outlook, right click on the root of the folder list, usually called your Mailbox name or your email address.

- Click on **Properties** or **Date File Properties** in the popup menu.
- Click the **Advanced** button. The filename will be shown on the dialog.

Then, rename this file. This will make Outlook create a new one:

- Close Outlook.
- Rename your OST file to anything you like.
- Restart Outlook.

If instead you're using a PST file, try running a Microsoft program called ScanPST. This checks PST files for problems and can usually fix any it finds. To run this:

- Close Outlook.
- Use Windows Search to look for scanpst.exe. Typical locations for this program are:
    - For 64-bit Outlook 2013:
      C:\Program Files\Microsoft Office 15\root\Office15
    - For 32-bit Outlook 2010 on 64-bit versions of Windows:
      C:\Program Files (x86)\Microsoft Office\Office14
    - For Outlook 2007:
      C:\Program Files\Microsoft Office\Office12
- When you've found scanpst.exe, double click the file to run it.
- Select your PST file by clicking the **Browse** button and then click the **Start** button to start the check. If you don't know the filename of your PST file:
    - In Outlook, right click on the root of the folder list, usually called "Personal Folders" or simply "Outlook".
    - Click on **Properties** or **Date File Properties** in the popup menu.
    - Click the **Advanced** button. The filename will be shown on the dialog.

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Customer Support

Before contacting us, you might get a quick answer when you check the following information:

- This online Help. You can click the **Index** or **Search** tab in the online Help to find an answer to your question.
- The Support FAQ.
- Popup help. For information about options and settings on any dialog box, click the Question Mark button at the top right hand corner of the dialog and then click a dialog option.
- The online Help for the Taskline task form in Outlook®. To access this, open a task in Outlook and click the icon on the **Taskline** tab of the form.

Ways of Requesting Assistance

Click the **Help and Support** button on the **Help / About** tab of Taskline's main dialog.

Support Form (www.taskline.com/supportForm.asp)

Office Hours, Monday to Friday

UK Time	10am to 5:00pm
Central European Time	11:00 to 18:00
Eastern Time	5am to 12:00pm
Pacific Time	2am to 9:00am

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If You Work Different Hours on Different Days

When we tell Taskline or Outlook that a task lasts for 1 day, or for 1 week, how many hours does that mean? Taskline needs to know the number of working hours in a day and in a week. Both Outlook and Taskline use this information to convert days and weeks to hours, and vice versa. These settings are set in Outlook:

- If you are using Outlook 2007, click **Tools** menu → **Options** → **Other** tab → **Advanced Options** button, to display the **Advanced Options** dialog.
- If you are using Outlook 2010 or 2013, click **File** (or **FILE** in Outlook 2013), then **Options** in the left hand bar, then **Tasks** in the left hand bar.

If you work the same hours each day, the hours you work each day and week are obvious. However, if you work different hours on different days, what values should you use?

For **Working hours per week**, add up all the hours you actually work in a week. To set a suitable value for **Working hours per day**, consider a task that takes one day to complete. Then ask yourself how many hours that task would take to complete – this is the setting you should use for working hours per day. Generally, if you work the same hours on most days, enter that many hours. If you work different hours almost every day, enter the number of working hours per week divided by the number of days you work.

Example 1. You work 9am to 6pm Monday to Thursday, and 9am to 4pm on a Friday, with a 1pm to 2pm lunch break each day:

- You could enter the **Working hours per day** as either 8 (your Monday to Thursday hours), or 7.6 (your average working day). 8 is probably the better choice.
- Enter the **Working hours per week** as 38.

Example 2. You work 9am to 5pm Monday to Friday, and 9am to 12pm on Saturday, with a 12:30pm to 1:30pm lunch break Monday to Friday:

- Enter **Working hours per day** as 7.
- Enter **Working hours per week** as 38.

Further Considerations for Taskline Standard Edition

If you are using Taskline Professional Edition, Taskline directly supports the working weeks in the above examples. However, users of Taskline Standard Edition can sometimes use recurring appointments as workarounds when you work different hours on different days.

Example 1. You work 9am to 6pm Monday to Thursday, and 9am to 4pm on a Friday, with a 1pm to 2pm lunch break each day:

- Enter your working week as Monday to Friday.
- Enter **I start work at** as 9am and **I stop work at** as 6pm.
- Enter a daytime break **From** 1pm **to** 2pm.
- Enter an appointment in the Outlook calendar from 4pm to 6pm on a Friday. Set this to recur every Friday. You might wish to name it something like "Non working time."

Example 2. You work 9am to 5pm Monday to Friday, and 9am to 12pm on Saturday, with a 12:30pm to 1:30pm lunch break Monday to Friday:

- Enter your working week as Monday to Saturday.
- Enter **I start work at** as 9am and **I stop work at** as 5pm.
- Enter a daytime break **From** 12:30pm **to** 1:30pm.
- Enter an appointment in the Outlook calendar from 12pm to 5pm on a Saturday. Set this to recur every Saturday, and name it something like "Non working time."

Related Topics

Setting the Working Week

Recurring Appointments

Microsoft® Exchange Server Synchronization Issues

Your Outlook information (emails, appointments, tasks etc) will generally either be stored locally on your own computer (for example, in a .PST file), or stored centrally on a computer running Microsoft Exchange Server.

Outlook 2000 and above have a facility for offline working. If you connect to Microsoft® Exchange Server whilst at work, offline working allows you to access the information in your Outlook folders even when not connected to Exchange Server and your company network.

Offline working works by keeping two copies of your Outlook information. One copy is kept on Exchange Server, and another copy is stored locally on your computer. Keeping these two copies mutually consistent is called **synchronization**.

If your Outlook installation has been set up such that your tasks folder is already available when not connected to Exchange Server, then this arrangement will continue to work with Taskline. If however you cannot access your tasks when you are not connected to Exchange Server, and you would like to, then you may find the advice below helpful.

Important: Setting up task synchronization is not a trivial issue. Do not change any synchronization settings without the prior approval of your Systems Administrator.

Outlook 2000

By default, the Tasks folder is not available when offline. To change this, click the **Tools → Synchronize → Offline Folder Settings** menu option, and check the folder that contains your Taskline tasks. Typically, this might be **"Mailbox – Username" → Tasks**.

Unfortunately, even when you update the **Offline Folder Settings**, quite often Outlook still refuses to automatically synchronize your offline folders. If, when you go offline, you find that you are looking at an old version of your task list, then you will need to synchronize your tasks folder manually before you shut down Outlook when connected to Exchange Server. To do this, make your tasks folder the current folder, and then click the **Tools → Synchronize → This Folder** menu option.

If you forget to manually synchronize your tasks folder, when you go offline your tasks folder will effectively contain an old out-of-date copy of your task list. It is advisable not to run Taskline on these out-of-date tasks, or indeed change them in any way, whilst offline. If you do so, Outlook's automatic re-sync will most likely fail when you reconnect to Exchange Server. Failed synchronization is shown by the task icon being replaced by crossed swords. You will then need to open tasks to resolve each synchronization conflict manually.

Outlook 2002

By default, the Tasks folder may or may not be available when offline – it depends on how the account was set up. When you go offline, if you find that your tasks are out of date, then you may wish to investigate the options below:

1. Manually synchronize your tasks while connected to Exchange Server and before you shut down Outlook. You can do this by making your tasks folder your current folder and pressing **Shift+F9**, or click the **Tools → Send/Receive → This Folder (Microsoft Exchange Server)** menu option.
2. To have your tasks synchronized automatically whenever you do a Send/Receive (or press **F9**), make the folder containing your Taskline tasks your current folder. Then

click the click the **Tools → Send/Receive Settings → Make This Folder Available Offline** option. If this menu option is not present, it usually means that you lack the necessary folder permissions.

3. Even if your local tasks folder is set to synchronize with Exchange Server when you do a Send/Receive, you can still get out-of-date tasks by changing some tasks, and then exiting Outlook before you do a Send/Receive. To address this, you may wish to have Outlook perform an automatic Send/Receive on exiting:
    i. Click the **Tools → Send/Receive Settings → Define Send/Receive Groups** option. This will display the **Send/Receive Groups** dialog.
    ii. On the **Send/Receive Groups** dialog, select the appropriate send/receive group from the list, and check the **Perform an automatic send/receive when exiting** check box, and then **Close** this dialog. Important: If you have several Send/Receive groups listed, consult your System Administrator as to which one you should change. Note that if you change the **All Accounts** group, this will synchronize *all* your offline folders on exit. If you only wish to synchronize your tasks on exit, consult point 4 below.
4. To have Outlook automatically synchronize only your tasks just before you exit Outlook, when you are connected to Exchange Server:
    i. Click the **Tools → Send/Receive Settings → Define Send/Receive Groups** option. This will display the **Send/Receive Groups** dialog.
    ii. Click the **New** button, which will display the **Send/Receive Group Name** dialog. Give the group a name of your choice (for example "Tasks"), and **OK** the dialog.
    iii. You will now have the **Send/Receive Settings – Tasks** dialog on screen (the exact title of the dialog may differ, depending on what you called your Send/Receive group).
    iv. Select **Microsoft Exchange Server** from the **Accounts** bar on the left hand side of the dialog. Select the **Include account in this send/receive group** check box, which is located at the top of the dialog.
    v. In the **Check folders to include in send/receive** list, check the folder containing your Taskline tasks.
    vi. Check the **Synchronize forms** check box and uncheck both the **Send mail items** and **Receive mail items** check boxes. Then **OK** the dialog.
    vii. You should now have the **Send/Receive Groups** dialog back on screen. Select the send/receive group you just created, and check the **Perform an automatic send/receive when exiting** check box, and then **Close** this dialog.

If you are manually synchronizing tasks to your offline folders, and you forget to do this, when you go offline your tasks folder will effectively contain an old out-of-date copy of your task list. It is advisable not to run Taskline on these out-of-date tasks, or indeed change them in any way, whilst offline. If you do so, Outlook's automatic re-sync will most likely fail when you reconnect to Exchange Server. Failed synchronization is shown by the task icon being replaced by crossed swords. You will then need to open tasks to resolve each synchronization conflict manually.

Outlook 2003

If you have Outlook 2003, you should have no synchronization issues if you enable Cached Exchange Mode. If you prefer not to use Cached Exchange Mode, then please follow the guidelines for Outlook 2002. However, note that the Outlook 2002 menu item **Tools → Send/Receive Settings** has moved in Outlook 2003 to **Tools → Send/Receive → Send/Receive Settings**.

Related Topics

Synchronization Conflicts

Using Taskline with FranklinCovey® PlanPlus

Taskline is compatible with FranklinCovey® PlanPlus versions 1 thru 6.

When using both PlanPlus and Taskline, there are a few minor issues to note:

- Taskline and PlanPlus use the same **Priority (A1)** setting on a task. Taskline allows values for **Priority (A1)** ranging from A00 to Z99. However, for maximum compatibility with PlanPlus, you should restrict your use of **Priority (A1)** values to the range A00 to C99.
- By default, Taskline will not schedule PlanPlus Masters tasks, which are tasks without a Due date, that are in the default **Tasks** folder. However, in other tasks folders, tasks with Due dates are scheduled. You can have Taskline schedule PlanPlus Masters tasks by selecting the **Schedule PlanPlus Masters tasks** option, which is on the **Advanced Options** dialog.
- The **Require that all tasks are assigned a category** option, on the **Advanced Options** dialog, is not supported. You cannot force tasks to have a category assigned when PlanPlus is installed.
- The PDA sync software that comes with PlanPlus will not synchronize Taskline tasks.

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Related Topics

Advanced Options Dialog

Using Taskline with the Getting Things Done Outlook Add-In

Taskline is compatible with NetCentrics Corporation's Getting Things Done Outlook add-in, versions 1, 2, 2.5 and 2.7.5.

When you create a task using Getting Things Done, you may get a standard Outlook task. To have GTD create a Taskline task, you will need to change a GTD setting. Please click here to see our FAQ entry on this subject.

How can Taskline and GTD Work Together?

We suggest you generally use Taskline as you would anyway, i.e. use it to schedule your task list. But some specific recommendations are:

- **Total work**. Taskline requires that each task is assigned an amount of **Total work**, which is your best guess at how long you think the task will take. For tasks that are created from emails by GTD, we suggest that you select the **Show Created Task** check box on the **Add to Action List** dialog, and add the **Total work** there and then, at task creation time. If you don't want Taskline to schedule the task, leave **Total work** as zero.
- Taskline Professional Edition works well with GTD **Actions**, such as @Home, @Office etc
    - Create a set of Taskline **Working hours** for each GTD **Action** that requires its own hours. How?
    - If you give your **Working hours** the same names as the GTD **Actions** they apply to, then those **Working hours** will be automatically selected by Taskline when it runs. For example, you may wish to create some daytime **Working hours** called "@Office" and some **Working hours** to cover evenings and weekends called "@Home". These match up with the GTD **Actions** of the same name.
    - Not all GTD **Actions** will require their own Taskline **Working hours**. For example, you may be happy to do @Computer tasks at any time during normal office hours. When the GTD **Actions** and the Taskline **Working hours** have different names, you will need to manually select the correct **Working hours** on the **Taskline** tab of the task form in Outlook.
- Someday tasks. If you keep all your future work in the "Somedayed" Project Actions folder, you might prefer to have Taskline schedule that folder, rather than the Tasks folder.
- Task prioritization. You will also need to prioritize your tasks, so that you do the most important tasks first. Without this vital step, there is a danger of procrastinating when deciding what to do next. This can be time consuming in itself. Or you may find yourself always picking the most enjoyable tasks, rather than the most important ones. Prioritization brings focus to your task list. Most people use either task **Natural Order** or **Priority (A1)** to define task priority. **Natural Order** is nice to use because it allows you to graphically reprioritize by dragging tasks up and down Outlook's task list. However, to do this you need to set up a task view with sorting and grouping switched off. Alternatively, use **Priority (A1)**, perhaps by adding an "A1" column to the standard GTD task views. With **Priority (A1)**, tasks are given a priority ranging from A00 to Z99.
- In your Weekly Review, reassess task priorities. Also check that you have not forgotten anything – omitting tasks is a common mistake. Then run Taskline to reschedule your task list and set the new focus for the coming week, and beyond.

Taskline®

Version 4.1

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Taskline Shortcut Key

You can start Taskline by using the **Ctrl + Alt + F5** shortcut key, if you selected this option when you ran Taskline Setup. If you didn't select the option, and you would like to use the shortcut key, run Taskline Setup again (do not uninstall first).

Summary of Task Schedule

The **Summary of Task Schedule** dialog reports information about your task list. The main list summarizes information by either **Project** or **Category**, depending on which **Task analysis** option you have selected.

The **Copy Table to Clipboard** enables you to quickly copy and paste the summary information into another application, such as Microsoft Excel.

The summary is only shown if the **Show summary when task reschedule is complete** check box, which is on the **Options** tab of Taskline's dialog, is selected.

Related Topics

Using Projects

Synchronization Conflicts

If you sometimes use Exchange Server offline, or sync with a mobile device, then you may get a "Synchronization Conflict" error or warning when you run Taskline. This happens when your local copy of an Outlook item is different to the copy held on Exchange Server or other device, and Outlook is unable to reconcile the differences automatically. The Taskline message should give you the name of the task or appointment that is causing the conflict.

The tasks or appointments that have failed to synchronize are shown on the task table view or the calendar with the task or appointment icon being replaced with a yellow diamond with red arrows. You will need to open these tasks or appointments to resolve each synchronization conflict manually.

If you can't see the yellow diamond, you'll need to add the icon column to the task table view, for example by using the Outlook Field Chooser.

You also need to make sure that your current view has filtering switched off, otherwise you may end up hiding those tasks or appointments that have the synchronization conflicts.

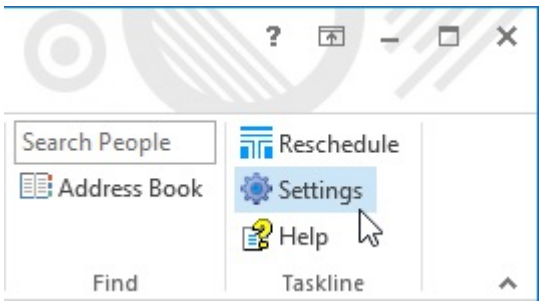
Related Topics

Microsoft® Exchange Server Synchronization Issues

Start Taskline by Clicking the Taskline Toolbar Button

Outlook 2010 and 2013

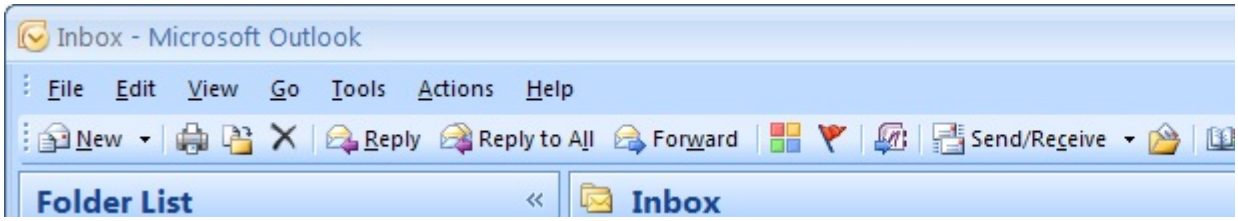
To display Taskline's main dialog, click the **Settings** button in the **Taskline** group of Outlook's **Home** tab:



Run Taskline immediately, without showing the dialog first, by clicking the **Reschedule** button

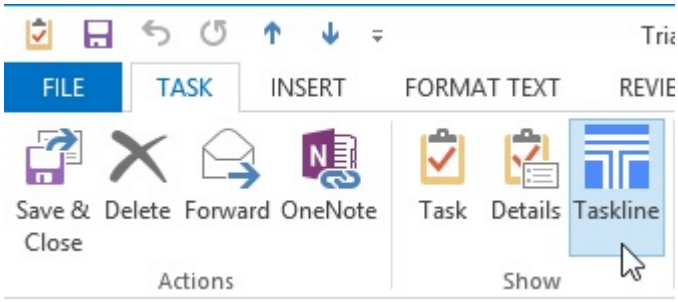
Outlook 2007

If you are using Outlook 2007, simply click the **Taskline** button on the main Outlook toolbar:



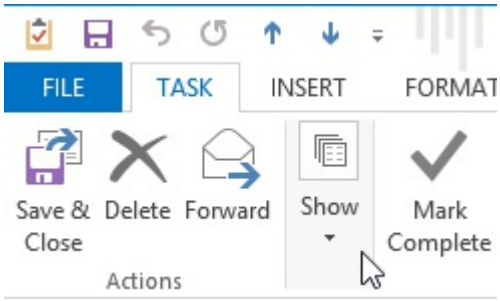
Displaying the Taskline Tab of the Task Form in Outlook

Click the Taskline icon in the **Show** group of the **Task** ribbon to display the Taskline tab.

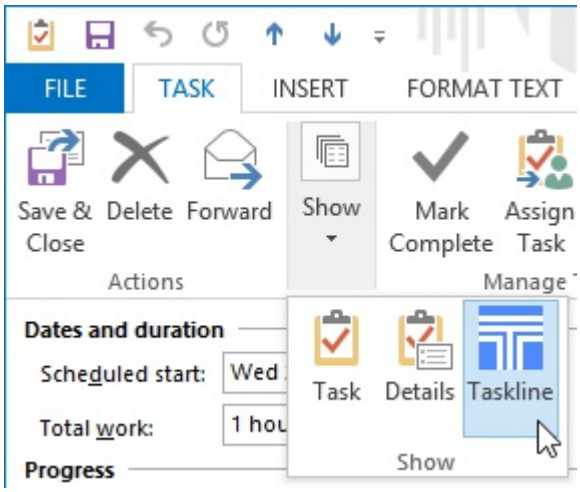


If your Outlook task window is narrow, you'll see slightly smaller icons:

If your Outlook task window is too narrow, the **Show** group on the task ribbon may be collapsed:



You'll need to either make your task window wider, or click the down arrow to expand it:



Uninstall Procedure

If you use Exchange Server, you must connect to your network before uninstalling Taskline.

To uninstall Taskline, do one of the following:

1. On Windows XP, Vista and Windows 7, click on the Windows Start menu, then click the **Uninstall Taskline** entry in the **Taskline** sub-menu.
2. On Windows 8 and 8.1, click the **Uninstall Taskline** entry on the **Start** or **Apps** screen.
3. On all Windows versions, open Windows Control Panel. Then:
    - On Windows XP, click **Add or Remove Programs**
    - On Windows 7, 8 and 8.1:
        - Optionally first click **Programs**, if you are in **Category** view
        - Click **Programs and Features**
    - Select **Taskline Outlook Task Scheduler v4.1** from the list, and click the **Uninstall** or **Remove** button

      Important

        - You will see 1 or 2 entries in Control Panel's list of installed programs for Taskline Outlook Add-Ins. Do not Uninstall these. If you do, you will end up with a partially uninstalled version of Taskline. Always only Uninstall **Taskline Outlook Task Scheduler v4.1** and this will uninstall the Outlook Add-Ins for you.

Tip

- If you wish to reinstall Taskline, you do not generally need to uninstall first.

What Was New in Previous Taskline Versions

Taskline Version 3

June, 2008

Product Requirements and Editions

- Taskline now requires Outlook 2000 or above.
- There are now two different Taskline editions – Standard and Professional.
- Taskline Version 3 is now compatible with the Getting Things Done Outlook Add-In v2.7.5, FranklinCovey® PlanPlus v5, OneNote® 2007 and Mindjet® MindManager® 7

Professional Edition

The following new features are in Taskline Professional Edition only (all other new features are in both editions):

- Multiple named sets of **Working hours** can be defined and different tasks can be scheduled to different time slots. For example, work tasks can be scheduled Monday thru Friday during the day, and personal tasks can be scheduled for evenings and weekends.
- You can instruct Taskline to ignore tasks which have been assigned particular **Working hours**.
- Different days of the week can have different working hours.
- Working 24 hours a day is supported. If the **To** time of a break or the **Stop work** time is 0:00, this is taken as midnight.
- Up to 4 day time breaks can be defined.

Standard Edition

This contains all the new features listed below. Additionally, there are two differences from Taskline v2.1:

- You can no longer override travel time per appointment. This feature is only supported in Taskline Professional Edition.
- You can only assign a single **label** (color) to calendar task entries. Professional Edition supports different **labels** (colors) being assigned to different types of tasks.

Task Progress

- The task progress model has been updated. Taskline no longer schedules completed tasks backwards from the **First task starts at** date. Instead, completed tasks are left unchanged by Taskline. In effect, the scheduled dates are assumed to have been correct. If things didn't go to plan, you can optionally reflect this by updating the tasks or the calendar task entries.
- Progress can now be updated from the calendar, as well as directly on the task itself.
- When opened, calendar task entries now feature a Taskline toolbar. This enables you to open the task, or mark the calendar task entry as Complete.

Projects

- A new **Projects** tab allows you to create and delete projects and set a project order.
- You can now order tasks by **Project**.
- You can instruct Taskline to ignore all tasks which have been assigned a particular **Project**.
- Calendar task entries can be colored according to **Project**.

Task Scheduling

- **Order by Due date**, which previously existed in earlier Taskline versions, has been reinstated. Ordering by **Due** date now works slightly differently to other **Order By** options in that Taskline will not only order by this date, but will also try and make sure that the task is completed on or before the **Due** date.
- You can now specify a **constraint time** for recurring tasks, to force recurring tasks to start or finish at a specific time, as well as on a specific date.
- When a task misses a constraint, Taskline now allows you to prefix the task subject with some text, so that you have a record of which tasks need attention. The default characters are "!!". Missed task constraints still result in a message box at the end of the task reschedule.
- There is a new **Missed constraint** task field which gives the elapsed gap between the scheduled date and the **constraint date**. This enables you to create an Outlook view highlighting tasks that need attention, optionally sorted into an order showing which tasks have missed their constraints by the greatest amounts.
- Regenerating tasks now get a warning message, rather than an error message, when their date is missed. This message will go away if the **Taskline should set Start and Due to the Scheduled dates** option is set. Furthermore, regenerating tasks that miss their dates will not mark the task as requiring attention. This is because regenerating tasks generally represent something that needs doing repeatedly, but not on specific dates. Regenerating tasks are a specific type of recurring task.
- Background reschedules no longer pop up an alert if task constraints are missed.
- There are new reschedule options, on the **Advanced Options** dialog, that help you to understand how Taskline schedules your tasks.

Miscellaneous Changes

- A **task import** feature creates tasks from text, one task per line of text. This is to quickly convert a text To Do list into Outlook tasks.
- There is a new **Advanced Options** dialog, which keeps the less often used options out of the main dialog tabs.
- There is a new advanced option to explicitly set the **Category** of Taskline-created calendar task entries.
- The **Summary of Task Schedule** dialog has been enhanced. It now shows a per-project or per-task category breakdown and also allows this information to be copied to the clipboard for pasting into a spreadsheet.
- If no time unit is supplied for appointment traveling time, minutes is now assumed. Previously, hours were assumed.
- A new **ABC** field on tasks contains the letter of **Priority (A1)**, if set. This allows you to group Outlook views by this letter.
- Taskline now supports Hungarian date formats (which have a separator at the end of the date).

- Tasks set to **Deferred** or **Waiting** now have their **Due** dates cleared. This is to remove them from Outlook's daily To Do list and also from the calendar.
- When there are multiple accounts on one computer, Taskline Setup now has the option to install Taskline for all users, or just the current user.

Taskline Version 2.1 December, 2004

- You can now control how Taskline splits a task into shorter parts during scheduling. You can switch off task splitting and you can specify the minimum duration of the parts of a split task. How?
- You can specify a time allowance before and after an appointment, to allow for traveling time or meeting preparation. You define a default traveling time for all appointments on the **Calendar** tab of the Taskline's dialog, which can be overridden on a per-appointment basis. How?
- There are new options to show task entries in the calendar as all day events. More.
- There is a new option to show milestones in the calendar as all day events. More. If you use Outlook 2002 or newer, you can also use labels to give milestones a different color on the calendar, to highlight them. How?
- Task priorities now use the A00-Z99 format. The **Task priority** option has been replaced with the **Priority (A1)** option on the **Taskline** form. The former **Task priority** option in Taskline versions 1 and 2.0 is still supported, but does not appear on the **Taskline** form.
- A new read-only task field is available to add to the task list view in Outlook: **Hours remaining.** This is same as the value for **Work remaining**, but is always represented as a number of hours.
- The **Ignore this task** check box is selected by default in this version of Taskline. However, when you enter information in the **Total work** box, this automatically clears the **Ignore this task** check box, allowing Taskline to schedule the task. Thus, to schedule milestones, which have zero hours **Total work**, you will now need to manually clear the **Ignore this task** check box.
- Taskline 2.1 is now compatible with FranklinCovey® PlanPlus versions 1, 2 and 3.
- You can now order tasks by the task subject. This is useful if you, or other software, place a code or priority at the start of the task subject.
- You can now assign each task to a project, to help you organize your tasks more effectively.
- There is now a command line option **/NoDialog** which allows you to run Taskline in the background using the Windows task scheduler. How?

Taskline Version 2 January, 2004

Task Scheduling

- Taskline now supports recurring tasks. You can schedule the next occurrence of a recurring task.
- You can specify task constraints, such as a **Finish On** constraint, with a date and omit the time. This reduces data entry and allows Taskline to optimize the schedule. If you don't supply a time, the constraint applies to any time during the specified day.

- If several tasks are dependent upon a constraint, such as several tasks affected by a deadline, you can select the other tasks from the Taskline task form in Outlook. This feature replaces and is more efficient than the Taskline version 1 Task Sequences feature.
- When you do not enter a value in **Total work,** a warning message displays.
- You can instruct Taskline to not schedule a task on the Outlook Calendar by clicking the **Ignore this task** check box on the Taskline task form.
- Setting **Ignore** for a task or setting the task status to **Waiting on someone else** or **Deferred** clears the **Scheduled Start, Schedule End** and **Week commencing** boxes.
- Taskline no longer supports the following constraints that were not used very often: **Start on or Before** and **Finish On Or After.**
- Taskline Version 2 now reschedules tasks faster than Version 1.

Improvements to the Taskline Task Form in Outlook

- You can select dates more accurately and efficiently with a Calendar control. This feature is not supported in Outlook 97.
- You can get Help from the Taskline form when you open a task.
- You can set whether the **Task** tab or the **Taskline** tab appears first on the **Taskline** form when you open a task.
- You can set an option so that all new tasks are assigned a category and that you cannot remove the category from existing tasks, although you can change the category.

Compatibility

Taskline is now compatible with:

- Outlook® 2003
- NetCentrics Getting Things Done Versions 1 and 2
- Franklin Covey® PlanPlus Version 1
- Chapura® Inc's PocketMirror®

Calendar Task Entries

- Taskline Version 1 introduced the ability to view your tasks in the Outlook calendar. If you use Outlook 2002 or 2003, then Taskline Version 2 now allows you to view your Calendar task entries quickly and easily in different colors. You can use the Outlook **Labels** feature to color tasks on the Calendar; for example, you might want to apply the color red to all high-priority tasks on the Calendar. More.
- Calendar task entries now get assigned the same values for category and importance as the tasks they represent.
- You can now create calendar task entries to show the following settings: **Busy, Tentative, Free** or **Out of Office.**

Miscellaneous

- You can run Taskline from within Outlook by clicking a button on the Outlook toolbar.
- You can set up the main options for Taskline during Setup.

- When Taskline schedules assigned tasks, you can prevent Outlook from sending update emails back to the task owner. This prevents Outlook from generating unnecessary emails.
- You can apply changes without closing the **Taskline** dialog box with the new **Apply** button.
- The **Summary of Task Schedule** dialog that appears when Taskline completes now shows enhanced content and presentation.
- Taskline can optionally update task **Start date** and **Due date.** Version 2 also adds the ability to restore the original **Start date and Due date,** if Taskline changes these dates.
- You can renumber tasks quickly with the new **Renumber Task Priorities** feature.
- Folder names on the **Taskline** dialog box now show the full folder path, rather than just the folder name. This removes ambiguities when two or more folders have the same name.
- When you enter tasks in Outlook's table view, you can use the constraint abbreviations **SO** for Start On, **SOOA** for Start On or After, **FO** for Finish On, and **FOOB** for Finish On or Before.
- Taskline installs completely and correctly on Windows NT, 2000, and XP, even if you do not have Administrator access rights.
- The evaluation period of the unregistered version is now 10 non-consecutive days, instead of 30 consecutive days.

What's New

For the latest What's New? information, please visit www.taskline.com/whatsNew.asp

Taskline Version 4.1 December, 2014

New Features Specific to Outlook 2013

- The Calendar Task Entry context (right click) menu now works on Outlook 2013 too. Commands available are **Open Task**, **Complete**, **Whole Task is Complete** and **Pin/Unpin**.
- You can set **Show time as** for calendar task entries to **Working Elsewhere**.
- There is a new **Advanced Option** – **Ignore 'Working Elsewhere'** appointments.

New Features for all Versions

- There are 2 new right click menu options for standard Outlook appointments: **Create Task** and **Create Task and Pin**. These enable you to do some planning in the calendar and then easily convert appointments into Taskline tasks. The appointment is itself converted into a Taskline calendar task entry, like those created by Taskline when it runs.
- There is a new **Create Task** right click menu option for Outlook emails, notes and contacts. This creates a new task from the item, leaving the original Outlook item unchanged.
- Pinned calendar task entries that are **Not Started** and have an **End** date on or before the **First task starts at** date (i.e. those pinned items that are in the past) are now automatically unpinned and rescheduled.
- The **Taskline** section of the ribbon in Outlook has a new button to display Taskline's online help.
- Outlook **Label** names have been removed, only **Label** colors are now shown and the word **Label** has been replaced by **Color**. This gives a cleaner and simpler interface.
- Calendar task entry colors and subjects now update when you click **Apply** – there's no longer a need to reschedule to have them updated.
- You can now have up to 9 day time breaks, up from the 4 previously supported.
- There is a new **ClearContext project compatibility** advanced option. If enabled, Taskline reads and writes task **Project** information from and to the Outlook **CC-TopicName** custom field, instead of the usual **Project** UDF.

Tasks in the Calendar Can Now be Colored Based on New Task Attributes

- **Overdue** so you can color overdue tasks differently.
- **Pinned** so you can color pinned and unpinned tasks differently.
- **Priority (A1)** letter, so for example **A** tasks can be colored differently to **B** tasks.
- There is a new color type on the **Define Colors** (formally Define Labels) dialog such that you can now prevent the creation of calendar task entries for tasks with certain attributes.

The Following Bugs Have Also Been Fixed

- If a task subject contained non-European characters, the subjects for the corresponding calendar task entries were being replaced by question marks. Now fixed.

Taskline Version 4 — March, 2014

Product Requirements and Compatibility

- Taskline now requires Outlook 2007 or above.
- Taskline is now compatible with both the 32-bit and 64-bit versions of Outlook 2010 and 2013.
- Taskline no longer uses a custom Outlook task form. Instead, an Outlook form region is used. This should eliminate most conflicts with other Outlook Add-Ins.

Task Scheduling

- There is a new **Work Between** constraint type, which allows you to specify 2 dates between which a task must be carried out.
- You can now edit Taskline-created task entries in the calendar and **pin** these so that they survive a Taskline reschedule. So you can use Taskline to automatically schedule your tasks and then tweak those results manually. Pinned entries do not get deleted and recreated during a Taskline reschedule, rather they stay put. Moving a calendar task entry will automatically pin it.
- For Taskline Professional Edition only, there is a new **Max time per day** setting. This is used to limit the amount of time allocated to a task each day. It can be used to spread a longer task out over several days or weeks, for example to divide your time between 2 or more tasks, rather than working on a single task exclusively until it's completed.
- For Taskline Professional Edition only, there is a new **Max time per week** setting. This is used to limit how much time is allocated each week to a long task.

Miscellaneous Changes

- You can now limit how many days in the calendar, after the **First task starts at** date, display scheduled tasks.

User Interface Changes

- The Taskline toolbar button is replaced by ribbon controls on Outlook 2010 and above. The ribbon has a new **Reschedule** button which runs Taskline immediately, without showing the dialog first.
- Ribbon support is added for calendar task entries.
- For Outlook 2007 and 2010 only, context (right click) menu support for calendar task entries is also added. This has 4 menu items – **Open Task**, **Complete** and new **Whole Task Is Complete** and **Pin** features.

Taskline Standard Edition

- Taskline Standard Edition now supports the same **labels** functionality as Professional Edition; different **labels** (colors) can be assigned to different types of

tasks.

What Was New in Previous Taskline Versions